

# EXHIBIT Y



the society for creative anachronism, inc.



## Seneschal's Handbook January 2018 Edition

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This edition was crafted and edited by: The Grand Council, Marilee Lloyd, Kimberly Langhans and many others dedicated to the SCA. Thank you to all.

## TABLE OF CONTENTS

<b>I.</b>	<b>INTRODUCTION .....</b>	<b>6</b>
<b>II.</b>	<b>AFFILIATE AND INTERNATIONAL INFORMATION/NOTICE.....</b>	<b>7</b>
	A. General Information .....	7
	B. Existing International Affiliates.....	7
<b>III.</b>	<b>PREPARING FOR THE KINGDOM SENESCHAL JOB.....</b>	<b>8</b>
	A. Warrant of Office .....	8
	B. Assemble a Reference Library, Resources and Tools .....	8
	C. Avoiding Burnout.....	9
<b>IV.</b>	<b>ARBITRATING THE RULES AND THEIR PRECEDENCE .....</b>	<b>10</b>
	A. Guidelines .....	10
	B. Order of Precedence.....	10
	C. Treaties and Charters .....	11
<b>V.</b>	<b>REPORTING AND COMMUNICATIONS .....</b>	<b>11</b>
	A. Quarterly Reports to the Society Seneschal .....	11
	B. Reporting Crown Victors .....	11
	C. 48-72 Hour Reply Goal .....	11
	D. Emergency & Sanction Communications .....	11
	E. Communication within the Kingdom .....	12
	F. Communication with the Crown .....	13
	G. Communication with Other Kingdom Officers.....	14
	H. Electronic Communications Policy .....	14
	I. Websites and Social Networking Sites (including Facebook) .....	15
	J. Corporate Mailing Labels .....	16
<b>VI.</b>	<b>DEPUTIES &amp; SUCCESSION PLANNING.....</b>	<b>16</b>
	A. Deputies to the Kingdom Seneschal's Office.....	16
	B. Emergency Replacement Deputy & Finding a Successor.....	16
<b>VII.</b>	<b>KINGDOM FINANCIAL MATTERS .....</b>	<b>17</b>
	A. Financial Responsibilities .....	17
	B. Theft Procedures.....	17
	C. Grants.....	18
	D. Membership Drives and recruitment activities .....	19
<b>VIII.</b>	<b>SUPERVISING BRANCH SENESCHALS.....</b>	<b>19</b>
	A. Mentoring Branch Seneschals.....	19
	B. Appointing Local Branch Seneschals .....	20

	C. Removing Local Seneschals .....	21
<b>IX.</b>	<b>DEALING WITH MODERN LAW AND LEGAL AUTHORITIES .....</b>	<b>22</b>
<b>X.</b>	<b>DEALING WITH MINOR/YOUTH-RELATED POLICIES .....</b>	<b>23</b>
<b>XI.</b>	<b>OVERSEEING BACKGROUND CHECKS .....</b>	<b>25</b>
	A. Scope.....	25
	B. Process for Conducting a Background Check .....	25
	C. Responsibilities of the Kingdom Seneschal for Background Checks .....	26
<b>XII.</b>	<b>MANAGING WAIVERS AND EVENT SIGN-IN SHEETS.....</b>	<b>26</b>
	A. Waivers for Affiliate Organizations.....	26
	B. Types of Waivers .....	27
	C. When Waivers are Required .....	27
	D. Minor Waivers .....	28
	E. Waiver Management .....	28
	F. Sign-In and Attendance Sheets .....	29
<b>XIII.</b>	<b>OVERSEEING CONTRACTS AND AGREEMENTS .....</b>	<b>29</b>
	A. Who May Sign Contracts.....	29
	B. Limitations .....	29
<b>XIV.</b>	<b>OVERSEEING KINGDOM EVENTS .....</b>	<b>30</b>
	A. Publicized Events .....	30
	B. Kingdom Event Sites .....	30
	C. Royal (Crown) Lists.....	31
	D. Removing SCA Sponsorship from an Event.....	32
<b>XV.</b>	<b>DEMO POLICY .....</b>	<b>33</b>
<b>XVI.</b>	<b>KNOWN WORLD EVENT POLICY.....</b>	<b>34</b>
	A. General Guidelines .....	34
	B. Known World Collegia/Symposia .....	34
	C. Known World Summit Meetings .....	35
	D. Society Anniversary Events .....	35
	E. Proposal Checklist Society Anniversary Events (See Section XXIII).....	36
	F. Proposal Approval and Acceptance .....	36
	G. Before the Event .....	37
	H. After the Event .....	37
<b>XVII.</b>	<b>CHANGING AND MAINTAINING KINGDOM LAW .....</b>	<b>37</b>
	A. Changes to Corpora.....	37
	B. Changes to Kingdom Law .....	38

C. Maintaining Kingdom Law .....	38
<b>XVIII. MANAGING KINGDOM BRANCH CHANGES .....</b>	<b>39</b>
A. Establishing New Branches .....	39
B. Creation of a Barony (or Province) .....	42
C. Principality and Kingdom Elevations .....	45
D. Branch Suspension .....	46
E. Branch Abeyance (Dormancy) .....	47
F. Lateral Branch Conversions .....	47
G. Branch Demotion or Dissolution .....	48
<b>XIX. INSURANCE MATTERS .....</b>	<b>48</b>
A. Regional Applicability .....	48
B. Insurance Guidelines .....	49
C. The SCA's General Liability Policy .....	49
D. The SCA's Directors' and Officers' Liability Policy .....	49
E. Host Liquor Coverage .....	49
F. Equestrian Coverage .....	50
G. Insurance Related Clarifications .....	50
H. Ordering Insurance Certificates .....	51
I. Ordering Fees .....	52
<b>XX. OVERSIGHT OF SOCIETY-OWNED TRAILERS .....</b>	<b>52</b>
A. Regional Applicability .....	52
B. Maintenance of Records .....	52
C. Procedure for Insuring SCA-Owned Trailers .....	53
D. Frequently Asked Questions .....	<b>Error! Bookmark not defined.</b>
<b>XXI. REGISTRATION AND LEGAL AGENTS .....</b>	<b>53</b>
A. Regional Applicability .....	53
B. State and Province Registration .....	53
C. Legal Agents .....	54
D. Nonprofit Status .....	54
<b>XXII. REPORTING INDEX .....</b>	<b>55</b>
<b>XXIII. PROPOSAL CHECKLIST FOR SOCIETY ANNIVERSARY EVENTS .....</b>	<b>56</b>
<b>XXIV. SOCIETY SENESCHAL POLICIES &amp; INTERPRETATIONS .....</b>	<b>58</b>
<b>XXV. ANNOTATIONS REFERRING TO GOVERNING DOCUMENTS (GovDocs) .....</b>	<b>61</b>
<b>XXVI. ERRATA .....</b>	<b>6160</b>



Guideline to Ethical Decision Making for SCA Seneschals

- Always comprehend the nature of one's words and actions and how they reflect upon you, your Kingdom and the SCA.
- Clarify your goals... what are your short term and long-term goals, i.e. what is the purpose for taking action or not taking action.
- Always strive for continuous personal improvement in serving others.
- Be aware of your ethical responsibility as an SCA Officer, i.e. without being respectful, caring, trustworthy, responsible and fair, you cannot fully serve the SCA's participants.
- In gathering facts, always attempt to get accurate, first-hand information from each side of a situation or conflict, speak directly to the parties or percipient witnesses and attempt to obtain complaints or statements in writing.
- Always be willing to adjust according to your observations and as such, do not take a position and then back it up with facts; rather, let the facts establish your position.

## I. INTRODUCTION

1. The Seneschal's Handbook is an official document of the Society for Creative Anachronism, and as such delineates policy, procedure, and recommended best practices for SCA branch operations. This handbook supersedes all prior versions.
2. This handbook is a living document, and as changes to policies or procedures are needed, the Office of the Society Seneschal will issue policy statements, policy interpretations, and implementation guidance. As these are upheld by the Board of Directors, changes will be issued as necessary and incorporated or appended to this handbook.
3. The information included herein is specifically noted as Seneschal policy and has been approved by the SCA Board of Directors.
4. This document supports and complements the branch operations implementation of the governing documents, but does not supersede or supplant anything in the governing documents. While this handbook is meant primarily for Kingdom Seneschals, all branch Seneschals should be using the information contained herein.
5. Kingdom Seneschals are first and foremost corporate officers of the SCA, Inc. They are the official officers acting on behalf of the Corporation and its interests and policies on a local level in their regions, and the local officers representing and acting on behalf of the local and regional interests to the Corporation. Seneschals are responsible for coordinating the administration and ensuring the proper and effective operation of the Society's historical "game-side" re-creation.
6. While the Seneschal is a very important position in any branch, it is essential to remember that the position is a part of a larger team of branch officers who make the SCA happen. The office of the Seneschal is a facilitator of policy and procedure from the local to corporate level. Successful Seneschals avail themselves of good interpersonal skills and diplomatic skills, attention to detail, and objective issue management. Seneschals must work with and through people, and their success is completely dependent on the goodwill and relationships they can manage and foster.
7. The official job title of any SCA Kingdom Seneschal is "Regional Vice-President of the SCA, Inc."<sup>1</sup> The Kingdom Seneschal is the only officer at the Kingdom level who is also defined as a Corporate officer. Note that different arrangements may exist within affiliate organizations.
8. The Kingdom Seneschal is the Kingdom's legal representative of the SCA, Inc. within their Kingdom and has responsibility for and authority in legal matters within the Kingdom.<sup>2</sup> They are the interpreter/arbitrator of Kingdom law and Kingdom Seneschallate Policies (this may vary by Kingdom). They are ultimately the one responsible for real-world legal, financial, and operational matters: sites, contracts, waiver policy, and making sure the SCA governing documents are followed. They may delegate some of this authority to local Seneschals and Event Stewards as appropriate under these documents and in accordance with Kingdom culture.
9. There is often much confusion about the separate lines of authority between the Kingdom Seneschal and the Crown.

- a. The Crown has all ceremonial responsibility and authority making decisions regarding Kingdom courts, awards, etc. They are in charge of administering the “game side” of the SCA in their Kingdom, within the confines of the governing documents and current Kingdom Law, and are responsible for fostering an appropriate atmosphere of participation within their Kingdom. The Crown may create or change laws within the Kingdom, while following all internal requirements, though these laws may not conflict with modern law or any higher SCA level policy or document. The Crown is responsible for monitoring and confirming the performance and conduct of Kingdom officers, and appointing, removing, and replacing such officers when necessary in conjunction with Society officers and the laws of their Kingdom and the SCA.<sup>3</sup>
  - b. A Kingdom Seneschal should keep the Crown informed of their actions and decisions. The Kingdom Seneschal and Crown must work cooperatively because their areas of authority frequently overlap.
- 10. Be aware that in kingdoms that are wholly, or partly, covered by an SCA affiliate organization, certain policies or rules may differ as defined in the affiliation agreements or other board rulings. Seneschals should be aware of these differences and act accordingly.
  - 11. In regard to chain of command, Kingdom Seneschals report to the Society Seneschal who, in turn, reports to the SCA President who reports to the SCA’s Board of Directors.<sup>4</sup>

## **II. AFFILIATE AND INTERNATIONAL INFORMATION/NOTICE**

### **A. GENERAL INFORMATION**

The SCA, Inc. is responsible for the oversight of the whole of the SCA. In turn, there are several constituent, affiliate organizations that accept Corpora but cover areas of different (potentially vastly different) modern law. The SCA recognizes the absolute precedence of law issued by civil authorities over any of its internal rules. The SCA, Inc. as a corporate entity, along with all of its members as citizens, must obey the law of whatever jurisdictions apply to them in exactly the same fashion as all other corporations or citizens in those jurisdictions.<sup>5</sup> Any Seneschal is responsible for insuring compliance with modern law, but if you are a Kingdom Seneschal who is outside of the United States (US) and is under an affiliate agreement, make sure to check with your affiliate’s governing documents for any exemptions or exceptions that your group may have been granted. Additionally, your local laws will be different than U.S. laws; while this document attempts to be of general applicability, make sure to check your local law for differences.

### **B. EXISTING INTERNATIONAL AFFILIATES**

- 1. The following are the Affiliate groups which cover non-US territory at the time of this revision:
  - a. SCA Australia (SCAA)
  - b. SCA New Zealand (SCANZ)
  - c. SCA Finland (SKA)
  - d. SCA Sweden (SKA)

### **III. PREPARING FOR THE KINGDOM SENESCHAL JOB**

#### **A. WARRANT OF OFFICE**

1. Your warrant makes you the Kingdom Seneschal, officially and legally. Ideally your predecessor initiated this process. Kingdom officers may not simply appear on rosters, because Corpora specifies that officers whose appointments require confirmation at the Corporate level must have individual warrants.<sup>6</sup>
2. Kingdom Seneschals must use the Executive Warrant form located at <http://www.sca.org/docs/pdf/govdocs.pdf> which must be completed as prescribed in Corpora in Appendix B.
3. Once the Crown signs the warrant, it must be sent to the Society Seneschal (it is your responsibility to either send it or ensure the Crown sends the document). Keep a personal copy in case it gets lost in the mail. Refer to yourself as Acting Seneschal until you have a fully signed warrant, but don't wait for your warrant to get to work. Regularly check with the Society Seneschal to make sure the form you have is current; copy it as needed for yourself and other offices.
4. Complete your term of office. Kingdom law and custom will control your term of office. Within broad limits, the length of your term, the application of a period of probation, and the availability of renewals are all left to your Kingdom.
5. Don't let your warrant expire. Get a new warrant for yourself or your successor before your current warrant expires. The 45-day grace period mentioned in Corpora is designed to protect the Kingdom in case of unavoidable delays in the paperwork, not to provide a guaranteed extension for your term.<sup>7</sup> It is recommended that you place a reminder for yourself on your calendar as soon as you receive your new warrant to renew your warrant at least 30-days prior to its expiration.

#### **B. ASSEMBLE A REFERENCE LIBRARY, RESOURCES AND TOOLS**

1. From Corporate you will receive:
  - a. Electronic access to the eNewsletters from all the other Kingdoms as well as the eBoard-Minutes.
  - b. Listing on the Inter-Kingdom Directory on SCA.org, which lists Corporate staff and Crowns, Royal Heirs, Seneschals, Exchequers, and Chroniclers for all Kingdoms. Please check your listing to ensure accuracy.
  - c. The Electronic Membership Listing, which is emailed monthly by the Registry to allow you to manage membership requirements in your Kingdom. Where all or part of the kingdom is covered by an affiliate organization, you should make arrangements with the appropriate registry to obtain membership information.
  - d. An updated list of revoked memberships, which is sent out monthly by the corporate office (comes with the membership list).
  - e. Access to an online membership verification tool that is especially helpful at Crown Tournament time. (May not apply to affiliates).  
<https://membership.sca.org/index.php?choice=retrieve>
2. From the Society Seneschal you should request:

- a. Big Book of Banishments. This is a document that shows all persons subject to sanctions, including the severity and duration of each sanction.
  - b. Membership in the Kingdom Seneschals' email discussion list at [SCAKingdomSeneschals@yahoogroups.com](mailto:SCAKingdomSeneschals@yahoogroups.com). Your official seneschal email address should already be subscribed.
  - c. You should send an email to your Kingdom's Ombudsman on the Board of Directors to introduce yourself and facilitate communication (email addresses available on the SCA website).
3. From online sources you should download and familiarize yourself with:
- a. The SCA's Organizational Handbook which includes Corpora, Bylaws, and the Corporate Policies of the SCA
  - b. The SCA Seneschal's Handbook (this document)
  - c. Society and Corporate Officers' Handbook
  - d. Branch Financial Policy
  - e. Your own Kingdom's financial policy and current law (and probably the last few editions of it)
  - f. Any current officer handbooks your Kingdom uses
  - g. The SCA Census
  - h. Insurance Ordering Instructions from [sca.org](http://www.sca.org) (within affiliates, separate insurance arrangements exist)
  - i. <http://www.sca.org/docs/library.html#officers> is invaluable

### **C. AVOIDING BURNOUT**

1. No matter how much you like being Seneschal or how much you may disagree at first, you are nonetheless in danger of burning out. The rewards are internal and intangible, and the costs in time, money, and peace of mind are great. Accept that you are at risk, and take steps to monitor yourself to avoid the possibility. Be aware when you are over your head.
2. Classic burnout happens when the sufferer finds their job intolerable and impossibly dear at the same time, so they can't do it properly and can't bring themselves to accept help either. Ask questions. Accept help. Delegate when possible and appropriate. This is a very large, demanding job; while it provides great benefits and is of immense importance, it should not drive you out of the SCA after your term or cause you to end your term prematurely.
3. Once you accept the possibility, you can protect yourself. Conserve and refresh yourself from day to day, take breaks, and start training a couple of successors while you still feel strong enough to go on. Make certain to keep doing the things that help you find the fun in the SCA.
4. Step down while you're ahead. It is better to regret leaving an office than to keep it so long you regret the day you took it! When your term is up, consider very carefully whether it is appropriate to extend.

## IV. ARBITRATING THE RULES AND THEIR PRECEDENCE

### A. GUIDELINES

1. Modern Law and local regulations always take precedence over any organizational requirement or policy – and no “game-side” situation or circumstance should ever hinder or supersede modern law and local regulations. Where modern law differs in different parts of the Kingdom, then the most appropriate jurisdiction should apply – i.e., that which applies where the event or activity itself is held. If in doubt, contact the Society Seneschal.
2. Within the SCA, Inc., if there is any conflict among the provisions of the following types of Corporate rules, those higher on the list will govern over those lower. Policies and handbooks are guidelines to help facilitate and interpret our rules and governing documents for those responsible with administering our organization and implementing our rules. Ultimately, however, the Board and all Corporate Officers are responsible to modern law and our governing documents.
3. Kingdoms, Principalities, and Baronies can add local guidelines to govern the running of their lands, which would then not apply in other SCA lands. They may be used to “add to” the procedures and restrictions defined in a document “higher up” in the precedence, as long as they do not contradict or overrule the higher-level rules. Kingdoms can be more restrictive, but not less restrictive than Society rules. For example, the Crown cannot write a law saying the kingdom financial committee is composed of only 2 individuals (in contravention of the more restrictive SCA financial policy), or the kingdom may not allow grappling on the armored combat field as that violates the more restrictive SCA marshallate rules banning such behavior. The kingdom could, however, ban thrusting in combat – since that would be more restrictive than SCA level rules which currently allow such behavior.
4. Note once again that different rules may apply in affiliates. While they are bound by Corpora, they have many exceptions or modifications required to fit in with local law. Make sure to check these documents when dealing with legal matters.

### B. ORDER OF PRECEDENCE<sup>8</sup>

1. Modern Law
2. The By-Laws of the Society for Creative Anachronism (SCA, Inc.)
3. The Corporate Policies of the SCA, Inc. (Different policies may apply to affiliates)
4. The Corpora of the SCA, Inc.
5. Affiliate governing documents, if applicable.
6. Interpretations of Corpora by the Society Seneschal approved by the SCA Board of Directors
7. Corporate Officer Policies and Handbooks
8. Individual Kingdom Financial Policies (Different policies may apply to affiliates)
9. Kingdom Law
10. Decisions of the Crown
11. Kingdom Officer Policies and Handbooks



12. Principality Law
13. Decisions of the Coronet
14. Principality Officer Policies and Handbooks

#### **C. TREATIES AND CHARTERS**

1. Treaties between Kingdoms are considered game-side-only, can be broken at will by the Crown, are non-enforceable, and are meant to add flavor and depth to the SCA experience; they hold no actual legal weight. Please note that large-event negotiations such as those which determine the legal structure and finances of Pennsic, Estrella, etc. do not fall in this category and should be changed only with the agreement of all parties.<sup>9</sup>
2. Branches and groups such as orders and guilds are permitted to create charters if they find it useful to codify their customs. Charters are primarily administrative tools that can help the group to define structure and procedures. Unless written into Kingdom or Principality law, organizational charters do not have the force of law. Branch charters may not be written into law.<sup>10</sup>

### **V. REPORTING AND COMMUNICATIONS**

#### **A. QUARTERLY REPORTS TO THE SOCIETY SENESCHAL**

1. Each Kingdom Seneschal must send a quarterly report to the Society Seneschal by the 15th of March, June, September, and December.
2. Use the online reporting tool found on the Society Seneschal's website.
3. Be sure to copy the Board Ombudsman for your Kingdom.

#### **B. REPORTING CROWN VICTORS**

1. Kingdom Seneschals must immediately notify the Society Seneschal via text or preferably email of the winners of the Crown Lists along with their full contact information.
2. Be sure to copy (cc) the Board Ombudsman for your kingdom.

#### **C. 48-72 HOUR REPLY GOAL**

1. Kingdom Seneschals should try for a 48 to 72 hour turn around on all email and phone communications. A simple "Got your message, I will get back to you" is just fine to ensure prompt response to communications.
2. A designated representative may respond in times when the Seneschal may be unavailable for 72 hours (business trips, non-SCA vacation, Pennsic, etc.).

#### **D. EMERGENCY & SANCTION COMMUNICATIONS**

1. Notify the Society Seneschal of any impending Royal or administrative sanctions (all types) as soon as it is reasonable.<sup>11</sup> If the Kingdom Seneschal tells the Society Seneschal before the Royalty pronounces the sanction, people can work together to make sure that the paperwork is all in order and proper procedures are being followed from the beginning. It has proven perilous for a Kingdom Seneschal or Crown to initiate sanctions which will require corporate level review without prior coordination with the Society Seneschal, or a designated deputy. The Board can, and does, sanction Kingdom level staff and/or Crowns who impose sanctions inappropriately.

2. Immediately notify the Society Seneschal about any occurrences that made it necessary to call the modern authorities (law enforcement, fire department, emergency medical) to the site of an SCA activity or event.<sup>12</sup> Such emergencies include injuries in which the victim is transported by EMS or ambulance.
3. Immediately notify the Society Seneschal of any threatened lawsuits.
4. Immediately notify the Society Seneschal of any incidents that may produce a claim on SCA insurance; within affiliates, additionally notify the relevant local officer.
5. Immediately notify the Society Seneschal and Crown of any suspected thefts, embezzlements, or other financial irregularities involving kingdom or branch funds, and ensure that the Kingdom Exchequer notifies the Society Exchequer immediately.<sup>13</sup> Kingdom Seneschals are not to attempt to 'make a deal' or negotiate in any way with the alleged perpetrator. Follow the procedures set forth by the Society Exchequer and branch financial policy for what to do in case of a theft from the SCA.
6. Immediately notify the Society Seneschal at once if he or she believes that the Crown's actions or the actions of other Great Officers are violating the rules of the SCA, Inc. or the laws of the jurisdiction under which the Kingdom falls.

#### **E. COMMUNICATION WITHIN THE KINGDOM**

1. Ensure Kingdom officers' meetings or curiae occur regularly as required by Kingdom law and appropriate for Kingdom tradition. Often the requirements for these are specified in your Kingdom law. Prepare an agenda before the meeting. Discuss the agenda with the Crown in advance of the meeting, and make sure any items they wish to discuss are included on the agenda. Preside if you can. If law and custom give this job to the Crown, make sure you sit near the Crown, and take an active interest in the entire meeting. If you are not running the meeting, assist in keeping things moving and bring the discussion back to the topic at hand when it strays. Share the results with the populace.
2. Arbitrate disputes where possible. Encourage people to come to you or your designee with disputes they can't settle for themselves. Stay out of feuds yourself. Often disputes are best settled at the level at which they occur. Attempt to catch issues early, it is useful to have Regional deputies who can spot and deal with issues before they become large problems. In-Kingdom arbitration should almost always be the first step if possible, rather than a request for official Board intervention. When in doubt, it is suggested that you request advice on how to manage disputes from the Society Seneschal.
3. Establish yourself as a source of reliable advice. Refer to your reference library when in any doubt as to an issue or question. Answer all questions cheerfully and patiently, with as much substantive information as you can, plus a referral to the officer in charge of the area, if there is one.
4. Keep the official Kingdom Calendar. You can delegate the maintenance of the calendar to another officer or to a deputy, but the policies about scheduling and conflict resolution belong to you. Depending on the laws of the kingdom, the Crown can override you for an event or a reign, in which case you administer the Crown's policies rather than your own, but the default position should be that the calendar is your job and that you are the one who resolves any disputes with it. The policies for scheduling events should come from you and the Crown (unless written into Kingdom Law).
5. Watch for things that need to get done. Keep an eye on the Kingdom as a whole, and look for things that the royalty or any of the officers might initiate to improve the general



quality of life in the SCA. You are responsible for the proper and efficient management of our “game-side” historical re-enactment, and pro-active management is often much more effective and efficient than reactive crisis management.

6. Listen. You'll find that a great many people want to talk to you, regardless of what you're doing or what you may be able to do for them. Though listening to the troubles and plans of the populace may eat a lot of time, especially at events, it is a great investment in proactive management and relationship-building to give an ear to what people have to say to you.
7. Reach out. In addition to listening to those who seek you out, you'll find it worthwhile to reach out. Call, travel to an event, and/or email people to notice work done well. Remember to thank people; you will feel better, and so will they. Much of the currency of the SCA is in recognition – both official and unofficial. Small words of recognition and encouragement are often as or more important than official awards and will buy both appreciation and goodwill.
8. Network. Develop a network of reliable contacts throughout the Kingdom. Find reliable sources of information and action across your region.

#### **F. COMMUNICATION WITH THE CROWN**

1. Always treat the Crown with deference in public – regardless of the forum. No matter how you feel about some individuals on the thrones, your role in our shared activity requires you to behave as though these points are always true:
  - a. The Crown is at the core of the SCA.
  - b. The Crown is always worthy of respect.
2. Treat the Crown with courtesy at all times. Address the Crown (instead of the person wearing it) even when no one is watching, and avoid invoking your prior relationship with the people serving as royalty. There will be times when you can let your hair down, especially with old friends, but let them make the first move, and always in private.
3. Make the royal lives as easy as possible. If the Heirs don't have their own support group, help them organize to make sure that not only will their physical comfort gets looked after while they are on the thrones, but that they are similarly supported in the administrative functions necessary to make their reign more successful. It is worthwhile to have a welcome package available for new Heirs. This may include Kingdom law, Corpora and Governing documents, recent Kingdom Curia meeting minutes, as well as any other policy information you deem of critical importance. If prior Kingdom seneschals have not created one, it could well prove a worthy project during your tenure.
4. Work with the Kingdom Exchequer to make sure the Heirs are fully informed regarding financial and budgetary matters as soon as possible. The new Crowns need to understand their fiscal responsibilities, what will and will not be paid for under your Kingdom's financial policies, the workings of the Kingdom Financial Committee, and so on.
5. Keep your royalty and royal heirs well informed regarding happenings in the Kingdom, including reactions to things they've said and done. Offer all counsel to the Crown with respect and courtesy.
6. Deal with disagreement calmly. If the Crown seems determined to do something you regard as dangerous for the Kingdom or the SCA as a whole, start by talking privately

with the royal couple. Always seek to understand what they really plan and what they mean—second-hand reports are often misleading—and explain why you believe the action is unwise. If it's against the rules as you read them, quote the specific citation and point out that you will have to consult the Society Seneschal about it—which may then lead to Corporate intervention. Try to find an approach that will accomplish the royal goals without the ill-effects you predict. Do note, however, that if you believe that there is something going on against either the rules of the Society or modern law, and the Crown will not be deterred, you must contact the Society Seneschal at once!

7. If you can't deflect the Crown from something you regard as unwise but not against the rules, focus on damage control. On one hand, look for explanations to help people accept the idea, and on the other hand, follow the commands in as neutral a fashion as you can.
8. It is the responsibility and honor of the Crowns to establish and present Awards and Accolades as they shall deem proper, in accordance with the laws and customs of the Kingdom. Even ill-judged awards have a place, because they establish the reality of royal power. Advise the Crown as clearly, soberly and courteously as you can.
9. The Crown may suspend a territorial Baron and/or Baroness for the duration of a reign, for just cause stated in writing and presented only to the Baron and/or Baroness. Suspension would prohibit the use of the baronial titles and arms, the conduct of baronial courts, and the presentation of baronial awards. The Crown may remove a territorial Baron and/or Baroness for just cause stated in writing and presented only to the Baron and/or Baroness; however, the Crown must request a written opinion from the populace of the barony before taking such action.<sup>14</sup>
10. The Crown may suspend the warrant of a Kingdom Seneschal for the duration of a reign, for just cause stated in writing.<sup>15</sup>
11. Warrants for Kingdom Officers are signed by the Crown and the corresponding Corporate Officer.<sup>16</sup> Kingdom Seneschals should assist with and work toward an effective and positive outcome of this process.

#### **G. COMMUNICATION WITH OTHER KINGDOM OFFICERS**

1. You need to know what is going on within your Kingdom in order to do your job, and to work with and through fellow Kingdom officers to do your job effectively. Ask the other Kingdom officers for a courtesy copy of their warrants and of their reports to the Crown and their Corporate superiors. Send them yours in exchange. Do not take active steps to second-guess another Kingdom officer unless there is a clear violation of Corpora or a complete loss of function in the office.
2. Make sure the other Kingdom offices stay filled and be prepared to help find a replacement if another officer fails to do so.<sup>17</sup>
3. Encourage the other Kingdom officers to talk to each other. The effective operation of our “game-side” historical re-enactment within a Kingdom requires all of its officers working smoothly together, the seneschal plays a vital role in seeing that communications remain clear so the Kingdom's work is done effectively and efficiently. Regular meetings are one way to ensure that communication happens. Rather than trying to “manage” other officers, try to coordinate and facilitate communications amongst and between you all.

#### **H. ELECTRONIC COMMUNICATIONS POLICY<sup>18</sup>**

1. It is important to remember that regardless of interpersonal relationships and informal modern communication links that may have been developed, Kingdom Seneschals are corporate officers and as such must communicate all official correspondences in a formal manner consistent with that corporate role.<sup>19</sup>
2. Formal communications to and from SCA officers may be directed through electronic means (email) as well as through postal or fax systems. However, messages posted for general attention on any public system may not be regarded as formal communications to an officer, whether or not that officer is known to participate on the electronic forum, email list or social media site in question.<sup>20</sup>
3. Formal email correspondence with an SCA officer is acceptable and official only when the officer has offered to communicate electronically by placing his or her email address in SCA publications, by releasing it for individual use, and by initiating email correspondence for official business.<sup>21</sup>
4. Formal email correspondence from an SCA officer is appropriate only as a reply to incoming email where electronic communication is clearly invited and welcomed by the recipient.
5. No personal and or identifiable information will be sent over email lists unless the individual gives permission to do so. A phone call or postal letter is also an acceptable means of communication.
6. If you and your local Seneschals or other Kingdom officers wish to do so, reports may be sent via email.
7. No messages posted to social media sites, general email lists, or other public electronic forums can be considered official communications. Therefore, these messages are not required to be part of your permanent files. However, it may be wise to keep copies of some messages if they could help to document a problem.

#### **I. WEBSITES AND SOCIAL NETWORKING SITES (INCLUDING FACEBOOK)**

1. For a digital site to be recognized by the SCA, it must represent an established branch of the Society and must have a warranted web minister responsible for its content. As they do not represent established branches of the Society, the SCA will not recognize sites for households or guilds. Group officers with a website are responsible for ensuring that the site complies with Society guidelines.
2. Personal information will not be published on any SCA recognized Internet site without first gaining permission from the individuals involved.
3. E-mail permission to electronically publish personal contact information is acceptable.
4. Permission to electronically publish the contact information of an individual is in effect until that same individual revokes permission.
5. Event Stewards may grant permission in writing to electronically publish the personal contact information of persons serving as event staff. In this case, it is understood that individuals volunteering to be event staff have granted this permission to the Event Steward.
6. Note that affiliates may have different publication policies.
7. See the Corporate Social Media Policy for more details.

#### **J. CORPORATE MAILING LABELS**

1. You may request mailing labels for these purposes:
  - a. Kingdom-approved Branch Polling
  - b. Kingdom Newsletters
  - c. Kingdom A&S Issues
  - d. Kingdom Law Issues
  - e. Other than the above cases (all of which must come through the Kingdom Seneschal or Kingdom Chronicler), the Corporate office cannot issue mailing labels/files for mailing to the membership.
2. As a reminder, when requesting the labels, please submit the postal codes, in numerical order, for the area you wish labels generated.
3. **Labels must be used within 10 days of receipt; then the file must be destroyed.**

### **VI. DEPUTIES & SUCCESSION PLANNING**

#### **A. DEPUTIES TO THE KINGDOM SENESCHAL'S OFFICE**

1. Kingdom Seneschals may appoint additional deputies (with the Crown's approval) as needed to perform the duties of their office. These deputies are covered under the Kingdom Seneschal's warrant.<sup>22</sup>
2. Each Kingdom shall have a single responsible officer (i.e. "Waiver Secretary") as a deputy to the Kingdom Seneschal to ensure that all required waivers, rosters, and sign-in sheets are collected and safely stored within a reasonable time after each event. The Waiver Secretary shall ensure that waivers for each event can be located and provided to the appropriate officials in the event a specific waiver is required. Each Kingdom shall store all original executed waivers, roster, and sign-in sheets, or legally accepted facsimiles, in such a manner that a responsible party can easily retrieve any needed waivers.<sup>23</sup>

#### **B. EMERGENCY REPLACEMENT DEPUTY & FINDING A SUCCESSOR**

1. All Kingdom Seneschals must have a designated emergency deputy at all times and must provide the Society Seneschal with this individual's name and contact information. This person should be someone who can step in until a successor is chosen, if you are suddenly unable to fulfill your role as Kingdom Seneschal.
2. The Society Seneschal must receive copies of any applications or resumes received for the Kingdom Seneschal's office.<sup>24</sup>
3. Both the Crown and Society Seneschal must agree on a candidate for the office of Kingdom Seneschal before they are put into office. The Society Seneschal will normally accept any reasonable choice the Kingdom Seneschal and the Crown propose.<sup>25</sup>
4. However, it is possible that a warrant may be refused. Grounds include but are not limited to:
  - a. Failure to meet membership requirements as specified in Corpora.
  - b. Being married or otherwise having too close of a relationship with the Society Seneschal or another Kingdom Seneschal. Also, too close a relationship (such as

marriage) between the Kingdom Seneschal and the Chronicler or Exchequer of the same Kingdom.

- c. Being too biased. A seneschal has to be able to serve all sides and citizens of the Kingdom, and be prepared to help people see corporate policies in a reasonably favorable light. Perceived tendencies toward controversy or factional orientation are grounds for question and possible non-confirmation of any appointment.
- d. Failure to meet the Society Seneschal's requirements for the job. These include the ability to write Standard English, as well as having a phone, internet access, reliable email access, and a fixed mailing address.

## **VII. KINGDOM FINANCIAL MATTERS**

### **A. FINANCIAL RESPONSIBILITIES**

1. The Kingdom Seneschal serves as one vote on the Kingdom Financial Committee, and may also be required to sit on other Financial Committees for your Kingdom's large inter-Kingdom events, if you have one. <sup>26</sup>All SCA Financial Committees are required to include at least one Seneschal. The role of the Seneschal on these committees is an important one; you are the legal representative of the Kingdom.
2. Remember that the Kingdom Seneschal is responsible for signing all contracts approved by the Kingdom Financial Committee. While this responsibility may be delegated, final responsibility rests with you.
3. The Kingdom Seneschal is responsible for ensuring that Corpora guidelines, and the deadlines, event requirements, and officer policies defined for the Kingdom (including any separate affiliate financial policies where relevant), are considered and followed by the Kingdom Financial Committee.<sup>27</sup>
4. A few limitations:
  - a. The SCA shall not purchase, use, or sell fireworks.<sup>28</sup>
  - b. SCA funds shall not be used to purchase alcohol in the US (different laws apply outside of the USA). The insurance policy for the SCA in the US does not cover the sale or purchase of alcohol. The international portion of the policy permits the purchase and sale of alcohol as long as it is not the business of the SCA.<sup>29</sup>

### **B. THEFT PROCEDURES<sup>30</sup>**

1. If a local Seneschal or Exchequer suspects a theft from a local account or any other fiscal wrongdoing, they should immediately report it to both the Kingdom Seneschal and the Kingdom Exchequer. Kingdoms can determine whether they want Principality or regional officers in the reporting chain or not in these matters. Immediate reporting to the Kingdom officers applies regardless of the person—all suspected thefts must be reported immediately. The Kingdom officers or their deputies will confirm whether a theft has occurred. Do not have local officers try to confirm whether a theft has occurred or try to negotiate with the person involved.
2. The Kingdom Seneschal and Kingdom Exchequer will be involved throughout this process, so both should be involved from the beginning. Good communication between the Seneschal and Exchequer is critical in this situation. Each must know what the other has done or is doing at all times when there is an investigation. Do not assume that the other officer is being kept in the loop by anyone else.



3. If the Kingdom Seneschal or Kingdom Exchequer suspects that a Crown is misappropriating funds, call both the Society Seneschal and the Society Exchequer immediately. If a Kingdom Seneschal suspects a Kingdom Exchequer, or vice versa, call the Society Seneschal and the Society Exchequer immediately.
4. The Kingdom Exchequer or their deputy will verify whether the suspected theft has occurred, either by reviewing the documentation provided by the group or by performing an independent investigation as recommended by Kingdom or Society investigation procedure guidelines. If the Kingdom Exchequer is satisfied that there has been a theft (rather than an error in bookkeeping), they will work with the Kingdom Seneschal to resolve the matter.
5. Do not contact the suspected thief until and unless the Society Seneschal and the Society Exchequer direct you to do so. The Kingdom Officers acting together will contact the person involved regarding their investigation, and give the person the opportunity either explain why the suspicions are unfounded or incorrect, or to replace any stolen money/equipment. Note that a simple denial of guilt is not a sufficient explanation.
6. Once the Kingdom Officers are satisfied that a theft has taken place, they should include a full accounting of what occurred in a report to their Society superior officers and confer with the Crown about appropriate sanctions. Depending on the circumstances, this will at a minimum include a request for an administrative sanction, and may include a request for an Expulsion and revocation/denial of membership.
7. Note: A theft of \$600 or more will necessitate the issuance of a 1099 form per IRS requirements.

### **C. GRANTS**

1. As a non-profit corporation, the SCA can pursue its mission locally, regionally, and nationally with funding provided by a range of local, regional, and national funding grants provided by a wide-range of public and private institutions. We encourage all local and Kingdom branches to determine if there are appropriate grants available, and to seek such funds to support our mission and the goals of the SCA. The Society President is the final signatory on all grants.
2. Make sure you are informed of grant applications before they are filed. Check to see whether statements about the SCA and the group submitting the bid are true and accurate, and that the project really does belong to the SCA. Grant agencies are generally too big to concern themselves with a single chapter of the SCA if they get unhappy—the Kingdom will surely be drawn in, so you should be involved from the start.
3. Confirm that the Kingdom and Society Exchequers have approved the accounting. Anyone wishing to apply for a grant in the name of the SCA must work out satisfactory accounting procedures, and must get written authorization from both the Kingdom and Society Exchequers before filing the grant application.
4. Do not permit grant applications on behalf of non-SCA people or groups. Many grant agencies will disburse money only to 501(c)(3) organizations, and so groups or individuals without that status often look for groups that do have it (like the SCA) to "stand fiduciary" for them, apply for the grant, and pass the money to them. Such arrangements are absolutely forbidden! Grant agencies can show up long after the money was spent and demand 'to the penny' accounting, which is bad enough if you spent the money yourself, and almost impossible if somebody else spent it.

**D. MEMBERSHIP DRIVES AND RECRUITMENT ACTIVITIES**

1. Membership drives, demos, and other recruitment activities should stick to encouraging people to join the SCA. Branches are welcome to hand out forms, discuss benefits of membership, and provide lower site fees for members (beyond not paying the NMS), if Kingdom law and custom allow the difference.
2. They can even offer memberships as prizes if the funds to buy the prize memberships are donated and are not SCA funds (It is not allowed to use SCA funds to buy personal memberships, save where permitted by local affiliate financial policy).
3. No one but the Registry is authorized to sell memberships in the SCA! Tell your local Seneschals not to collect membership forms and payments to be forwarded to the Registry, and have them try to stop anyone in the branch from doing so.

**VIII. SUPERVISING BRANCH SENESCHALS****A. MENTORING BRANCH SENESCHALS**

1. Local Seneschals are your people. Advise them, support them, listen to them, let them operate on their own as long as things are going well; intervene if the members get unhappy with their Seneschal. If at all possible try to mitigate a situation before things get out of hand.
2. Make it a rewarding experience. Talk to your people—answer their letters and e-mails within two days— make sure they're the first to know the facts behind the rumors.
3. Don't try to run your own local branches. It's difficult, but you must avoid acting on information you know only because of proximity to where you live. Your local branches must be treated just like any others. Let the Seneschal take the initiative when it comes to discussing local problems with you. And don't hesitate to point out that you're hearing too much, if the local Seneschal starts trying to foist the management of the branch onto you.
4. All local Seneschals are required to read and be familiar with Corpora, Society policies, Kingdom Law, and affiliate agreements (where relevant). This document also provides a good frame of reference and broader context for a new local Seneschal.
5. Local Seneschals and Exchequers must be a part of their local Financial Committees. Each committee needs only one other person to make the required minimum of three members. The minimum for approval is a simple majority. For additional details on the composition of the Financial Committee, refer to Society Financial Policy or the Kingdom Exchequer Handbook.
6. Only paid members in good standing may be on the financial committee.
7. Branch seneschals are required to review branch financial reports and banking documents.
8. Help local Seneschals understand their role as coordinators. Local Seneschals can't hire and fire the rest of the branch staff, any more than you can do so at the Kingdom level.
9. Avoid concentrating local offices in one family or household. Work with the local Seneschal and your fellow Kingdom officers to divide things up as much as possible. The offices of Seneschal and Exchequer may not normally be combined in one house. The Seneschal and the Exchequer CANNOT be the same person! If for some reason a group

cannot meet these requirements, they can apply to you and the Kingdom Exchequer for a variance. Use your own good judgment in deciding whether to grant it.

10. Training Local Seneschals on how to oversee local branch events:

- a. Local Seneschals play a key role in determining the SCA responsibility for events. Be clear in the difference between a published SCA event or activity and a private party or activity. A Society event must fulfill the requirements in Corpora—that is, it must be recorded with the local Seneschal, publicized at least to the membership of that group, and conducted in keeping with the SCA purpose and rules. Seneschals are reminded that all SCA events must be sponsored by an official branch of the SCA. Unofficial special interest groups--such as households, ships, guilds, or clans--wishing to host events must obtain the sponsorship of an official branch before proceeding.
- b. SCA money may not be spent on private parties.
- c. SCA insurance will not cover private parties. This includes household functions. If the event, revel, etc., is not sponsored by an officially recognized branch of the SCA, our insurance may not be used.

## **B. APPOINTING LOCAL BRANCH SENESCHALS**

1. Six months prior to the end of a local branch seneschal's term, either you or the local seneschal should open the office for applications by advertising the opening in the local newsletter and other appropriate venues (e.g., local meetings, email lists, or social media). The six-month timeframe allows for a three-month application period and a three-month training period for the incoming officer.
2. Encourage branches to seek consensus when choosing officers.
3. Endorse the person proposed by the outgoing branch Seneschal if you can. The ideal is that the outgoing Seneschal and the branch will find someone suitable for the job, and all you and the Crown need do is approve the choice. If you're getting complaints from the branch about the proposed candidate, talk to everyone before placing the person on a roster. The seneschals' job should always be posted in the local branch newsletter and any local e-lists.
4. Strategies for dealing with difficult or contested appointments:
  - a. Ideally, each local Seneschal should select a deputy (acceptable to the Kingdom Seneschal) who can intervene in the event of an emergency vacancy. However, if the outgoing Seneschal leaves without proposing a successor or having an emergency deputy, you need to get the job filled as smoothly as possible. Depending on the local circumstances, any of the following steps may work:
    - i. Ask the baron/baroness or another branch officer to hold a meeting to find somebody.
    - ii. Pick a suitable person, and suggest they volunteer. While this may be a quick solution, it may leave the impression that you are selecting a "favorite". Step in only with substantial caution, and if no suitable candidate appears.
    - iii. Announce that you (or your regional deputy) will act as branch Seneschal until a suitable candidate comes forward. You may establish a clear time frame for this solution, after which the branch will be expected to have a selected an acceptable candidate.



- b. Contested appointments: If the outgoing Seneschal and/or the branch propose a successor you don't regard as suitable for the job, proceed very carefully:
    - i. If it's a matter of relations between your personal household and another or a personality conflict between you and the candidate, with no glaring problem in the candidate, sign the warrant.
    - ii. If you have reservations about the candidate's communications skills or tact, issue a short-term warrant.
    - iii. If they are not qualified, ask for another name.
- 5. Keep the local warrants up to date. <http://www.sca.org/docs/pdf/govdocs.pdf> has the SCA Executive Warrant form. You may use rosters or individual warrants, but both need royal signatures.<sup>31</sup> Per Corpora, rosters must include the following information for each officer: legal and Society names, address, telephone number, and appointment and expiration dates. A roster must be signed by both the appropriate Royalty and by you, and it must contain the statement that it is the current roster of the Seneschal's office of the Kingdom of (your Kingdom name here) of the Society for Creative Anachronism as of the current date.<sup>32</sup> It is best to update this and have it signed once per reign. The other Kingdom (and Principality) officers can use the same system for warranting their local subordinates as well.
- 6. Help new Seneschals get oriented to the job. Serving as local Seneschal is often a member's first big step behind the scenes. Even other officers may think events happen spontaneously (except perhaps their own small parts), but the Seneschal knows for sure how much work there is! It's a good idea to send a job-description letter to every new Seneschal to be sure they have an idea of what they're supposed to be doing in their new office. Try to make some personal contact; it may come as a surprise to you, but newer members and newer officers will sometimes regard you as a VIP whom they have no business bothering! Combat these tendencies—make sure you're approachable.

### **C. REMOVING LOCAL SENESCHALS**

- 1. Dismissal of any officer should be treated as a last resort. If a local Seneschal is in trouble, talk with them and look for a way to salvage the officer first. Find out what's really going on, work with the individual and establish a clear action plan and schedule for efforts and improvements moving forward. Give the Seneschal a chance to clear up any problems, real or perceived. If the Seneschal is involved in a difficult situation or adding to the trouble, even if the attacks are largely unwarranted, it may be best to let someone else (but NOT one of the attackers) try to smooth things out. You may wish to involve a more local impartial third party to assist in any investigation or resolution process. Per Corpora, any dismissal requires royal approval, unless Kingdom law specifies levels of inactivity or non-reporting are equivalent to resignation.<sup>33</sup>
- 2. Note that the Society's grievance procedure does not apply to removal of an officer for cause (at any level). However, in a non-emergency situation, it is best to give the officer a warning and a chance to 'fix' the problem. Good management practices dictate trying to resolve problems with the person who is the problem.
- 3. Local officers can be suspended on the same terms as Kingdom officers. You can suspend a local Seneschal for up to 90 days, and the Crown can do so for the duration of their reign. The warranted deputy (if one exists) steps in to fill the office.<sup>34</sup> Suspension is an effective way to put someone out of play while you figure out if dismissal is in order

and reach agreement with the Crown, but it should be applied only after careful thought and communication with the officers concerned and with the branch.

4. Grounds for dismissal should be concrete and not related to personal relations with you and/or the Crown. Examples include:
  - a. Repeated complaints from the branch. Encourage people to use orderly complaint procedures. If your Kingdom has a written complaint procedure, refer people to it; otherwise, refer them to the one in the Organizational Handbook.
  - b. Encouraging activities detrimental to the SCA. The Seneschal should be leading branch opinion towards constructive activity and away from anything that would call our reputation or effective operations into question.
  - c. Lack of judgment in dealing with the media.
  - d. Inability to organize branch activities or to allow anyone else to do so.
  - e. FAILURE to communicate. This isn't just a matter of assigned reports; it is also about how the Seneschal communicates with other branch members, other officers, as well as you.
  - f. Egregious displays of lack of respect for the Crown.

## **IX. DEALING WITH MODERN LAW AND LEGAL AUTHORITIES**

1. If a Seneschal, one of their warranted deputies (such as an Event Steward), or an agent of the SCA (such as a warranted officer of any level of the SCA) is approached by a victim of a modern law crime, that victim be encouraged to go straight to the modern authorities.<sup>35</sup> If the reporting party refuses to summon the authorities, the incident should be documented in writing, including the time, date, name of the event at which it occurred (if applicable), name and signature of the officer to whom the report was made, and that the victim was encouraged to contact law enforcement but declined to do so. Then pass all info to the Society Seneschal.
2. To determine the circumstances where it is appropriate to call the authorities, you should apply the "Reasonable Person Test." Would a reasonable person call the authorities in this situation? Crimes of violence: yes. Crimes involving minors: yes. Crimes of a sexual nature: yes. Jaywalking: no. If you need help determining the appropriate course of action, contact the Society Seneschal for assistance immediately.
3. When a person is brought to event staff with injuries that appear to be the result of violence, the event staff should offer to call both EMS and the Police. If the authorities are called, do not question the alleged victim.
4. For Minor/Youth-related policies, see Section X.
5. SCA volunteers will not put themselves in the position of investigating criminal acts or interviewing alleged victims, unless involved in official sanction investigations after-the-fact. If modern authorities assume control and responsibility for the matter, this does not preclude the SCA from taking other measures as may prove appropriate.<sup>36</sup>
6. It is the policy of the Society Seneschal that the SCA, Inc. (and its affiliate bodies) do not administer modern-era court orders (such as child custody, visitation, domestic violence protective or other types of restraining orders or injunctions), and as such Seneschals and Event Stewards will refer participants to modern-era authorities for enforcement. If a

member went to the local mall, he/she would not expect a store manager to enforce a protective order against a spouse who shows up there—he/she would call the police. It is the same at an SCA event.

7. When an individual is injured at an SCA event, the individual will determine the type and form of medical care required, and assumes all responsibility for their own medical care and well-being. If the individual is unconscious, or appears incapacitated the event staff should summon emergency medical assistance. If the individual refuses aid, it is their choice, but the individual's refusal of aid should be noted.
8. You have access to our legal advisors through the offices of the President and Society Seneschal. If legal issues need to be addressed, do not hesitate to inform the Society Seneschal and the President. The Society Officers will assist with contacting the proper individuals. It is far better to seek professional assistance than to assume knowledge of appropriate legal interpretation.
9. Only the President has the ability to retain legal counsel (attorney, barrister, solicitor, et al), whether paid or unpaid (pro bono) on behalf of the SCA or any of its branches. No other officer, at any level of governance of the SCA has the authority to retain (even pro bono) legal counsel to advise or represent the SCA or any branch, without prior written authorization and confirmation of the retention of such counsel from the President.<sup>37</sup>
10. Americans with Disabilities Act/Disabled Participants: Refer to Section XIII of the SCA Corporate Policy.<sup>38</sup>

## **X. DEALING WITH MINOR/YOUTH-RELATED POLICIES**

1. Minors are defined as anyone who has not reached the age of legal majority. This varies between countries, states and other jurisdictions. Be sure of the legal age of majority in your area.
2. The SCA is a family and youth friendly social organization. SCA youth activities and classes are offered as a positive means of encouraging the participation of minors in the SCA with their families. These activities should foster recreational-focused learning about history and the SCA. Dedicated and/or published youth-oriented activities (SCA Youth Activities) are overseen by warranted youth officers at any and all events and activities. These youth officers must have successfully passed an SCA approved background check and the Youth Officer (and if applicable, YAFA Administrator) must be warranted.
3. Parents or guardians of minors shall have ultimate responsibility for the welfare and behavior of their children at all times. It is the responsibility of the adult who brings a minor to an event to ensure that the minor is safe and not in danger. At events and activities in which youth participate in any way, participating minors must either have a parent or legal guardian present at the event/activity, or a temporary guardian present in possession of a properly executed "Medical Authorization Form for Minors." This Medical Authorization Form must designate an adult present at the event or activity as able to authorize medical treatment in the case of emergency. "Present" is defined as the parent or guardian being in direct sight and sound of the minor youth. SCA youth activities are not babysitting services and parents are not allowed to simply drop off their children and leave the area of the activity to take part in other activities.

4. All warranted Youth Officers (deputies who ultimately report to the Kingdom Seneschal) must have a warrant, a current SCA membership and an approved, current and valid background check. "Warranted" is defined as having a signed warrant making the individual in question an official deputy to the Kingdom Youth Officer or to the Kingdom Seneschal. Youth and Family Achievement (YAFA) administrators must likewise be warranted; they must also have passed a current and up to date SCA approved background check.
5. All official or "published" SCA Youth Activities must have at least two unrelated adults with one adult member who has an SCA approved current background check acting as the official "coordinator" for that SCA Youth Activity. There may be classes that are not geared towards minor children but where youth are still welcome; parents must be present (within sight and sound) of their child when attending these classes or there must be at least two unrelated adults with one adult member who has an SCA approved current background check. The marshal activities in the SCA that are not specifically youth activities (i.e. not Youth Combat) and in these cases, the parent or guardian must be present when the youth is taking part in these marshal activities.
6. The "2-DeepD" rule specifies that for all SCA Activities, a minimum of 2 adults (at or above the age of legal majority in the state, province or country in which the activity occurs) unrelated to one another by blood, marriage or personal relationship must be present. This policy does not relieve parents of their primary responsibility for the welfare and behavior of their children. One of these two adults may also be the official coordinator (i.e. Youth Officer, Deputy Youth Officer or YAFA Administrator) for the youth activities.
7. All individual youth Officers and their deputies, YAFA Administrators, YAFA Mentors, Youth Marshals and the Kingdom Seneschal who manages these Officers who deal with minor youth participants shall all be required to pass an SCA approved background check.
8. Persons who have been convicted of crimes against minors are not eligible to participate in SCA Youth programs.
9. In the case of a crime where a minor is the victim, it is mandatory that immediately refer the matter is immediately referred to the modern law enforcement authorities; and to inform the Kingdom Seneschal and Society Seneschal shall also be contacted immediately.
10. Branch and regional Seneschals, Marshals, Marshals-in-Charge, and Exchequers must be at least the age of majority for their jurisdiction. Be aware that the age of majority does vary between jurisdictions; these officers must be old enough to serve in each and every area within the local group or Kingdom.
11. Minors 15 years of age or older may assist in serving officers with the express written approval of the parent or legal guardian, the officer and their Kingdom superior. In this and all cases involving minor participation at SCA Activities, parental/guardian accompaniment and the "2-Deep" still applies.
12. Minors who are less than age 15 may assist in serving officers with the express written approval of the parent or guardian if they are not dealing with the public at large

(gate/troll) and not handling money. In this and all cases involving minor participation at SCA Activities, parental/guardian accompaniment and the “2-Deep” rule still applies.

13. Medical treatment of minors is subject to the appropriate laws of the state, territory, province, and/or country where the event is held. In the case of a medical emergency involving a minor, the parent, legal guardian or non-parent/legal guardian, i.e. the temporary guardian with the Medical Authorization Treatment Form for Minors per XII.D, must be contacted if they are not present at the scene of the emergency.

## **XI. OVERSEEING BACKGROUND CHECKS**

### **A. SCOPE**

1. A background check is required for the following officers: Kingdom Seneschals or Youth Coordinators at any level (or any other officer whose responsibility is the oversight of youth activities). Furthermore, it is required that when youth activities are held, there must be at least two non-related adults, one of which must have passed a background check. A background check is also required for all YAFA Program officers including volunteer mentors.
2. These rules only apply to groups operating within the United States of America and Canada. If your group is outside of those two countries, please see your affiliate agreement and governing documents to ensure you follow procedures approved for your jurisdiction, if any.

### **B. PROCESS FOR CONDUCTING A BACKGROUND CHECK**

1. Individuals required to submit to a background check must:
  - a. Fill out a blank background check authorization form and submit it only to the Corporate office, via e-mail, fax, or mail. Other methods of sending the form may also be approved by Corporate, as appropriate. It is up to each requestor to submit the paperwork for his or her own background check authorization. Forms contain personal data, and therefore should not be submitted to any Kingdom officer.
  - b. Notify the Kingdom Youth Coordinators that they have requested a background check.
2. The Kingdom Youth Coordinators will provide the Kingdom Seneschal a list of all requested background checks.
3. The Kingdom Seneschal will review and approve the list of requested background checks, and forward the list of approved requests to the Corporate office.
4. Once the background check authorization form has been received, the Corporate office will:
  - a. Maintain a list of all approved requests for background checks.
  - b. Check the requestor’s current membership status, and check the requestor’s name against his or her kingdom’s list of individuals for whom background checks have been approved.
    - i. If the requestor is not a current member of the SCA, they are not eligible for a background check, and their forms will be returned with an explanation of why they are currently ineligible.



- ii. If the requestor's name is found on the "Approved by Kingdom Seneschal" list, then the requestor's data will be sent to the company conducting the background check to begin the process.
  - iii. If the requestor's name is not found on the approved list, it will be added to a "Not Approved by Kingdom Seneschal" list for that kingdom, along with the date the name was added. Every month, Corporate will send the names of those on the "Not Approved by Kingdom Seneschal" list to the appropriate Kingdom Seneschals. If no approval is forthcoming from the Kingdom Seneschal in three months, or if a specific notice of disapproval is received, then the name will be struck and the form will be returned to the requestor along with a letter explaining that they have not been approved.
5. After a form has been passed to the company conducting the background investigation, the Corporate office will note a charge on the requesting kingdom's spreadsheet. Each month, each Kingdom will be invoiced for half of the charge of all requested background checks for the previous month for that Kingdom. Invoices are due and payable upon receipt.
  6. Once the Corporate office has received the adjudication from the investigating company, the requesting member's information will be updated:
    - a. If a "Pass" or "Fail" decision is returned, the Corporate office will notify the requestor via mail of the decision and the SCA, Inc. will update their records to reflect the "Pass" or "Fail" decision and the appropriate expiration date.
    - b. If a decision of a "Hold" is returned, then that information will be updated in the SCA, Inc.'s records and further adjudication will be undertaken to provide a clear "Pass" or "Fail" response, as above.
  7. Once a month, the Corporate office will send the Year to Date results to the Kingdom Seneschals for review.
  8. Background checks must be renewed every two years.

#### **C. RESPONSIBILITIES OF THE KINGDOM SENESCHAL FOR BACKGROUND CHECKS**

1. The Kingdom Seneschal is responsible for distributing blank background check authorization forms to the Youth Coordinators in their Kingdom. SCA, Inc. will provide blank background check authorization forms to each Kingdom Seneschal as necessary for this purpose.
2. The Kingdom Seneschal will review and approve the list of requests for background checks as provided by the Youth Coordinator(s) of their Kingdom.
3. The Kingdom Seneschal will keep a record of all approved requests for background checks.

## **XII. MANAGING WAIVERS AND EVENT SIGN-IN SHEETS<sup>39</sup>**

### **A. WAIVERS FOR AFFILIATE ORGANIZATIONS**

1. Waivers as a whole are very country specific. If you are in an affiliate organization, it is the Seneschal's duty to see if there are any policies that alter the information below. SCA, Inc. waiver policy applies except where replaced by local regulations in affiliate organizations.

## B. TYPES OF WAIVERS

1. Standard Waiver—formerly called the “Consent to Participate and Release Liability,” this form contains the same waiver language as is found on a membership application. The Standard Waiver is also sometimes called an “Event Waiver,” “Adult Waiver,” “Fighter Practice Waiver,” or “Consent to Participate.”
2. Roster Waiver—same as the Standard Waiver but allows for multiple signatures.<sup>40</sup>
3. Minor Waiver— See XII.D. below
4. Equestrian Waiver—formally called the “Waiver And Informed Consent To Participate In SCA, Inc. Equestrian Activities,” this form is the waiver required for participation in any equestrian activities.

## C. WHEN WAIVERS ARE REQUIRED

1. Waivers are required at all events at which any SCA activity is published which includes announcement of date, time, and location by an officially recognized branch of the SCA through any of their official communications media including newsletters, e-newsletters, e-lists, and official social media sites.. Business meetings, demos where there are no combat-related activities, guild meetings, dance practices, private activities and the like are not included in the waiver policies. If in doubt about whether a specific function falls under the waiver policy, make a ruling and report it to the Society Seneschal at the next opportunity.<sup>41</sup>
2. Kingdoms may require all attendees at an event to sign waivers, if they wish. As Kingdom Seneschal, you may make the determination of whether an SCA function falls under the waiver policy or not.
3. Who must sign a waiver:
  - a. If a person does not have a blue membership card with them that denotes both an SCA membership and a signed Consent to Participate **OR**
  - b. Is not a member of the SCA **OR**
  - c. Has forgotten their blue membership card<sup>42</sup>
4. Individual Kingdoms or site owners may impose additional or more stringent requirements at their discretion. Site owners and Kingdoms may not change or modify the Society Waiver without Board approval.
5. At events where published combat-related activities occur (such as a war or a fighter practice) Marshals, Heralds, and any other volunteers working directly with the fighters need to sign the waiver because they are on the field and are at risk.<sup>43</sup>
6. That means SCA members who do not have their blue cards with them, or who have a non-blue membership card indicating that there is no signed waiver on file for them in the SCA Corporate Office, must sign a waiver to attend an event or participate in fighting activities at a published fighter practice.
7. Any person participating in SCA published equestrian-related activities, including riding or authorization check rides, horse handling, ground crew, mounted games, and combat, marshaling, or even being present at published equestrian activities as an observer, is required to sign a Society for Creative Anachronism Waiver and Informed Consent to Participate in SCA Equestrian Activities form or roster. Equestrian waivers are available in the SCA Equestrian Handbook.

8. Spectators at demos or any other published activity need to sign waivers if they become participants or if equestrian activities are held.

#### **D. MINOR WAIVERS**

1. Minors (persons under the age of legal majority in the state, province, or country in which the SCA function occurs) are welcome to participate in the activities of the SCA, subject to the following rules:
  - a. Any minor attending an SCA event must have a Minor Waiver completed and signed by their parent or legal guardian. (Minors with blue cards indicating a waiver at the Corporate Office that is signed by a parent are treated the same as adult blue-card attendees with regard to waivers.) The parent/legal guardian needs to be on site with the minor at all times or an adult who is responsible for the minor as long as the parent/legal guardian completes and provides the appropriate paperwork, such as an adult is termed a “temporary” guardian. Roster waivers are not acceptable for use with minors.
  - b. The parents or guardians of the minor must witness SCA combat, discuss with a witnessing marshal how it relates to the participation of their child, and execute a “Minor’s Waiver and Informed Consent to Participate in SCA Combat-Related Activities.” The witnessing Marshal must countersign the waiver. A Minor waiver must be signed if the minor is participating in fighting activities. Fighting activities include armored combat (heavy weapons), fencing, combat archery, marshalling, scouting, youth combat, or banner bearing in combat. In this case, parents should be carefully informed of what is going on. Corpora (Rules of the Lists) requires that parents “witness the activity, discuss it with a witnessing marshal, and execute a waiver for the minor.” Witnessing marshals must be explicitly authorized to perform this function by the Kingdom Earl Marshal.
  - c. Authorization for combat in any of the forms listed above by minors can be performed only by the Kingdom Earl Marshal or those explicitly authorized to the task, with the exception of rapier combat, which must be authorized by the Kingdom Rapier Marshal or those explicitly authorized to the task.
  - d. In order to be authorized for armored combat or the marshalling of armored combat, a participant must be at least 16 years of age. The eligible age for authorization in all other adult combat-related activities is 14.<sup>44</sup>
  - e. From the Marshal’s Handbook: “At any event in which the minor is involved in SCA combat-related activities, the minor must either have a parent or guardian present, or must be in possession of a properly executed “Medical Authorization Form for dMinors.” Said Medical Authorization Form must designate an adult present at the event as able to authorize medical treatment in the case of an emergency.” This document should stay with the parent, legal guardian or temporary guardian during the event in case of an emergency. See the appropriate sections of the Marshall’s Handbook for details regarding all aspects of minor related combat activities.

#### **E. WAIVER MANAGEMENT**

1. Waivers will be collected and sent to the Kingdom Waiver Secretary (a Deputy to the Kingdom Seneschal) for storage.<sup>45</sup> Kingdoms must create laws or Seneschal policy to implement this requirement.



2. The Waiver Secretary shall ensure that waivers for each event can be located and provided to the appropriate officials in the event a specific waiver is required.<sup>46</sup>
3. Adult waivers shall be maintained for 7 years and minor waivers for 20 years after which they should be destroyed.<sup>47</sup>

#### **F. SIGN-IN AND ATTENDANCE SHEETS**

1. Sign-in or attendance sheets are not required; however, if your Kingdom typically uses them, they become a part of the waiver package that must be sent to the Kingdom Waiver Deputy.
2. If your Branch Financial Policy requires that the sign-in sheet be kept, a legally accepted facsimile can be sent to the Waiver Deputy.

### **XIII. OVERSEEING CONTRACTS AND AGREEMENTS**

#### **A. WHO MAY SIGN CONTRACTS**

1. Only local branch, Kingdom, and Corporate Seneschals, their specifically authorized delegates (like event stewards) or specifically approved corporate officers, may sign contracts in the name of the SCA, Inc.<sup>48</sup>
2. Only a paid member of the SCA may be delegated for this duty.<sup>49</sup>
3. Kingdoms or branches may involve other officers in discussing or approving contracts, but may not remove the Seneschal from the process.
4. Seneschals must execute this delegation of responsibility in writing via a formal warrant of their deputy in accordance with the process for warranting officers in their respective kingdom(s). Remember an Event Steward is a warranted deputy thus can sign contracts.

#### **B. LIMITATIONS**

1. No Seneschal may commit higher levels of the SCA to any action. The main limit on delegated contracting authority is that a Seneschal may only sign a contract for his or her own branch. For example, a Shire Seneschal can bind the Shire to support a civic activity, but cannot promise that the Kingdom will show up to back the group.
2. Minors may not sign legally binding contracts; therefore, Seneschals must have reached the age of majority for their jurisdiction.
3. When a person other than the warranted Seneschal is needed to sign facility use agreements in order to enjoy organizational use or discount privileges, the warranted Seneschal for that branch will review and initial the contract prior to it being signed. However, specific prior authorization is always required, and the delegated person must meet the membership requirements for officers as defined in Corpora and be a formally warranted deputy Seneschal of the sponsoring branch.
4. No agreements may extend the use of the SCA name to an outside group or individual. Do not permit contracts or activities extending the SCA name to an outside group. Some communities allow nonprofit organizations with 501(c)(3) status like ours to run bingo games or other fundraising events, which are otherwise prohibited, and people who want to hold such events look for qualified sponsors. The SCA forbids such arrangements.
5. The President must approve site contracts for any SCA events with expected attendance of 2,000 or more or have a total budget of \$75,000 or more.

## **XIV. OVERSEEING KINGDOM EVENTS**

### **A. PUBLICIZED EVENTS**

1. Keep track of things that need Kingdom-level publicity. The SCA Inc. no longer makes a distinction between official and unofficial events (only published and unpublished), but certain things—the installation of Kingdom great officers or a new territorial baronage; the granting of awards of arms, grants of arm, or patent of arms; the announcement of law changes; and, of course, Crown or Coronet tournaments or investitures—can only occur at events that have been publicized in advance in the Kingdom newsletter (be it online or printed).
2. Events that must be publicized in advance must be publicized both on the Kingdom calendar and in a detailed announcement or flier in the Kingdom newsletter—the calendar notice is not enough on its own. Make sure your Crown and your local Seneschals are aware that this is required by Corpora.<sup>50</sup>
3. The Kingdom Seneschal, working in conjunction with the Crown, is responsible for creating and maintaining event-scheduling policies within a Kingdom. The Kingdom Seneschal is ultimately responsible for making sure that Crown, Coronation, and other events the Kingdom has designated as “Kingdom events” occur. The individuals leading those events are deputies of the Kingdom Seneschal for the time they are heading those event staffs.
4. Awards that carry precedence (AoAs, grants, and patents) cannot be given at events that have not been publicized in advance<sup>51</sup>, but promises of future awards can be granted. If the Crown decides to attend an event that was only publicized locally, make sure that they remember that no awards of precedence can be presented at that event. However, the Crown can call forward deserving members, praise them in front of their friends, and announce their intent to present thus-and-such award at the earliest opportunity.
5. You may permit branches to mention local events on their local branch's published calendar without printing fliers for them, but make sure they understand that the calendar entry doesn't make the event eligible for royal action.
6. SCA events and event announcements need to enhance our reputation. Remember that all events announced in the newsletter should support our organizational purpose. This excludes, for example, events based around live-action fantasy role-playing games and activities involving drinking contests.
7. Seneschals are reminded that all SCA events must be sponsored by an official branch of the SCA.<sup>52</sup> Unofficial special interest groups wishing to host events, such as households, kingdom orders, ships, guilds, or clans, should obtain the sponsorship of an official branch before proceeding.

### **B. KINGDOM EVENT SITES**

1. Kingdom-level events must have suitable sites. While some Kingdoms make the Seneschal directly responsible for selecting sites and finding Event Stewards for Kingdom-level events, others use site coordinators, require bids, or use a regular rotation. It is always and ultimately your responsibility to make sure that Crown, Coronation, and other events designated Kingdom events in your Kingdom have a place to happen.

2. Event Stewards may not mislead site owners nor misrepresent their policies. If the owner has a no-alcohol policy, the site cannot be billed as permitting discreet use of alcohol. Policies on animals, number of people on-site, or other restrictions should also be publicized well in advance and adhered to.
3. Service animals should be admitted in accordance with relevant local or national legislation. You are permitted to ask the owner if the animal is a service animal but current law prohibits further inquiry, such as a request for documents or certifications. If the owner says yes, admit the animal. If the animal is aggressive or destructive, you are permitted to ask the owner and animal to leave. The only service animals permitted under US law are dogs and mini horses.

### C. ROYAL (CROWN) LISTS

1. Royal lists must be conducted at a tournament announced in the Kingdom newsletter as being for that purpose. Crowns or Coronets who wish to conduct a Royal List in a manner other than individual combat must obtain the prior approval of the Board of Directors.<sup>53</sup> Work with Royal Heirs early to ensure their desired format is within the confines of Corpora and Kingdom Law.
2. Publicize the membership rules for Crown and Coronet Lists. Corpora delineates the membership requirements and the rules on how membership is defined and enforced. Corpora specifies that “any officer of the SCA or representative of a Kingdom found responsible for allowing a non-member to participate, as an entrant or prospective consort, in a Royal List will be subject to sanctions.”<sup>54</sup> Make sure your Royalty and list officials are aware of this fact! In addition, the Crown list winners have 10 days to show their membership will remain valid for the duration of the reign.<sup>55</sup> If the membership of either member of the Royal couple is set to expire at any time before their reign would end, advise them to immediately renew membership using the online renewal system. Note that local exceptions regarding membership duration may apply within international affiliates.
3. Accept proof of membership only if it comes from the appropriate registry (i.e. SCA, Inc. or your affiliate registry (‘the Registry’). To establish membership, a person needs a current valid membership card, a current newsletter label, an entry on the Email Registry membership printout, or a postcard or letter from the Registry confirming that the membership has been received. Also acceptable are confirmations of valid membership from the on-line membership application. The phrase “letter from the Corporate Office confirming that the membership has been received” includes the downloaded form received from an online membership sale from the SCA website or an electronic notice from the SCA, Inc. Registrar of membership confirmation.<sup>56</sup>
4. It is your responsibility to check memberships for Crown entrants and consorts carefully! Document your membership verification. Printouts may be ordered from the registry.
5. Be generous in the face of conflicting information. If an individual has a card showing one date, while the Registry listing shows another date or misses the name entirely—you may accept whichever is more favorable to the member. However, you must send photocopies of both to the Registry immediately after the Lists, because these conditions indicate a potential problem in the computer system.

6. You may accept suspended memberships for Crown participation only if all of the following apply:
  - a. The problem involves the member's address, not a bad check. If so the Registry must be informed of the proper address immediately. If it is a bad check, the membership lists will say "BAD CHECK" under the expiration date, and that is how you can tell the difference.
  - b. The membership must not have been in a state of suspension beyond the end of its term. You can find the original expiration date on the membership card or an old mailing label. Failing that, ask the Vice President for Corporate Operations (or appropriate affiliate officer) to check the master list for you.
  - c. If the membership would still be good if it hadn't gone into suspension, you can allow the person to participate as soon as he or she gives you evidence that the Registry has been told to reactivate the membership. If the membership would have expired before the tournament in question, the suspended membership cannot be accepted as valid until the Registry actually reactivates it—which can take up to 14 business days.
7. Check membership on people serving as officers. All officers must be paid members of the SCA. This includes all Royalty, Territorial Barons and Baronesses, and Event Stewards. Once a year, take the Registry printout and look at the listings for your local Seneschals and your fellow officers at the Kingdom and Principality level.
8. Make sure your Crown is aware of any Kingdom laws requiring membership.

#### **D. REMOVING SCA SPONSORSHIP FROM AN EVENT**

1. "Removing SCA Sponsorship" means the Kingdom Seneschal declares that the SCA is no longer associated with an event, and that people who choose to remain on the site do so at their own risk.<sup>57</sup> This is a very serious step, and the Society profoundly hopes you never have to take it. This is a last resort. Use it only if the Society's rules are being broken in ways that seriously endanger the populace or the organization. Before removing SCA sponsorship, be sure to explain to the Event Steward and the ruling nobles present what the problems are, and give them the opportunity to take corrective action. Explain the consequences that will follow if you are forced to remove SCA sponsorship and do it only if they refuse to work with you to correct the problems.
2. Once you have removed SCA sponsorship of an event, no further official SCA activities may be conducted, and people who choose to remain on the site are on their own. If the property is owned or rented by the SCA, people should leave at once. If it's unreserved public property, announce that the SCA and its insurance will not provide protection for anyone, regardless of what happens from there on. Besides announcing the decision throughout the site, you must make a serious attempt to notify the site owner, and you must file a full report with the Society Seneschal, any applicable affiliate officers, and your Board ombudsman—and your Crown, if they weren't there—as soon as possible.<sup>58</sup> If you reach the site owner, describe the problem and ask whether he wants you to get assistance from the civil authorities in clearing the site; if you can't reach the site owner and it's not a public park open to anyone, call the police on your own if people don't depart. Expect that the Board will consider revoking memberships on the basis of your report—possibly yours, if they feel your action was frivolous.

3. It is desirable to take some time in Kingdom Officer meetings and local Seneschals' meetings to make sure other officers understand the implications of removing SCA sponsorship, both for the organization and for themselves.

## **XV. DEMO POLICY**

1. A demo ("demonstration") is an organized educational effort to teach and/or display activities of pre-17century life, interest in general, and SCA interest in particular, to the general public. They are an important way of introducing ourselves to the community, fulfilling our organizational mission of education, and possibly finding new recruits for the SCA. However, not all demos are the type that results in new members. An elementary school demo is fun, but the likelihood of recruiting new members is low. A university or Renaissance Fair demo is more likely to attract new members, but does not necessarily contain the educational community-relations value of a school demo. Both are important, and a group should find a balance between them.
2. In order to be covered by SCA insurance, demos must be approved by the sponsoring group's Seneschal and the branch may restrict who may represent them to the public. Restricting participation should be done with extreme caution and care. A demo may also be an "event" if it meets the requirements for an event as outlined in Corpora and corporate policy.<sup>59</sup> At any demo, at least one paid SCA member must be present and in charge of the demo.
3. Demos where there are no combat-related activities do not require waivers unless they are held as part of an SCA "event." Therefore, if there is no combat, and the demo is not held at an SCA event, waivers are not required. Waivers may be completed individually, or a roster waiver may be used. It is not required that spectators at demos sign waivers, as long as they don't become participants.
4. As with all martial activities, an authorized marshal of whatever forms are being displayed must be present if there is fighting at a demo. SCA combatants must be authorized in that weapons' form/style in order to perform at the demo.<sup>60</sup>
5. Demo organizers should pay particular attention to site/host restrictions regarding SCA and weapons and activities. In general it is not a good idea to allow the general public to handle steel weapons at a demo and steel weapons must never be left unattended. All SCA weapons must never be left unattended and in plain sight and access of the public. (They may be stored unattended in tents, trucks, etc.)
6. Since observers of SCA demos are generally not familiar with SCA combat activities, special care for safety must be taken. Boundary ropes are strongly recommended, and sufficient safety personnel must be provided to ensure safety of combatants and observers.
7. A member of the SCA may not hit a member of the public with any weapon regardless of whether the member of the public is in armor and gives consent. Adult members of the public who wish to try armored combat should be referred to the nearest SCA group for instruction. (Note: target archery is not considered a "combat-related activity," and so waivers need not be signed for that activity, but be certain that all appropriate safety procedures are followed.)
8. With specific safety restrictions, supervised children age 12 and under may hit an armored SCA fighter with foam weapons only, not rattan weapons. Waivers are not



needed from the parents of children who take part in “fight-a-knight” activities. Minimum safety standards include keeping unarmored observers at least 10 feet away from the armored fighter and child. Individual Kingdoms may make more restrictive policies.

9. Whenever a demo is done with children present, a minimum of two unrelated adults must also be in attendance at that demo (the “two-deep” rule). “Children” refers to anyone under the age of legal majority.
10. No one may bring weapons of any kind onto the grounds of a school without prior knowledge and consent of the school officials.
11. There is no SCA policy that prohibits an SCA group from charging a “demo” fee to the organization requesting the demo. However, most groups accept donations rather than charging a set fee. With either a donation or a “demo” fee, all monies should be in the form of a check, payable to the “SCA, Inc., [group name]”. Under no circumstances should an individual receive cash or a check made out to them personally. SCA site fees may not be charged at a demo unless the demo is held as part of an SCA event. Outside the USA, payment should be made to the branch by the appropriate means if checks are not relevant.
12. Assuming appropriate safety precautions are in place, and with any necessary instruction, participation is a highly effective method of educating the demo guests—and fun for both the SCA member and guest.

## **XVI. KNOWN WORLD EVENT POLICY**

### **A. GENERAL GUIDELINES**

1. There are 3 types of Society-Wide Events: Known World Collegia/Symposia, Known World Summit Meetings, and Society Anniversary Events.
2. Each one of these events, once approved, is a separate project of the SCA, Inc.
3. Each project is not complete until all required reports are completed, received, and approved by the appropriate Society Officers. Local or regional events cannot, by definition, style themselves as Known World Events.
4. Each Event will be allowed to print advertisements in all Kingdom Newsletters without charge. Space allocated in pamphlet-style newsletters will be one full page or two half-page ads. Space allocated in full-format style newsletters will be one half-page or two quarter-page ads. Kingdom Newsletters may require a payment to print advertisements over this allocation. Advertisements are subject to the submission deadlines set by each Kingdom. The formatting of the advertisement shall be at the Kingdom Chronicler's discretion, and must meet the Society standards for event advertisements.
5. Visit <http://www.sca.org/docs/pdf/kweventpolicy.pdf> for more details.

### **B. KNOWN WORLD COLLEGIA/SYMPOSIA**

1. Collegia/Symposia are large-scale events focused on specific areas of interest, (artistic, martial, or administrative) and open to general attendance and participation by SCA members and non-members.
2. Each Society Officer will make a policy regarding how and how often events focused on their joint or several venues are to be solicited, and as to what the content of these

events can or cannot be. The subject area sponsor (Society Officer, Deputy Officer, etc) may decide to schedule a symposium and invite the membership to proposal on the same, or a local person, branch, or organization may seek Society Event Sponsorship by proposing the same to the appropriate Society Officer.

3. Proposals for these events are collected by the Society Officer in charge of the focused area of interest.
4. Proposals are accepted by the Society Officer involved with a courtesy copy to the Society Seneschal.
5. Criteria for Bids/Proposals for Collegia/Symposia
  - a. Criteria will be determined by the Society officer(s) responsible for the event.
  - b. Minimum information in order for the event to appear on the Society Calendar is:
    - i. Name/date/location of Event
    - ii. Name of Event Steward
    - iii. Planned Activities
    - iv. Event Financials (as per Society Anniversary Event proposal)
    - v. Evidence of Kingdom and Branch Support

#### **C. KNOWN WORLD SUMMIT MEETINGS**

1. Known World Summit Meetings are events dedicated to a specific administrative venue and are restricted in attendance to Kingdom Officers, Kingdom-level deputies, and Society-level deputies.
2. Summit meetings are groups of officers and/or subject matter experts that get together in person for the purpose of improving the overall issues, efforts, and effects of the area of interest.
3. These events are not open to the general membership and participants of the SCA and are invitation-only.
4. Proposals as such are not solicited for summit meetings, but event proposals and plans are prepared by the appropriate Society Officer or their project manager for the meeting
5. Proposals are accepted by the Society Officer involved and copied to the Society Seneschal.

#### **D. SOCIETY ANNIVERSARY EVENTS**

1. These events occur at a minimum every 10 years and in some cases every 5 years.
2. These events are large-scale events with a general focus and open to general attendance and participation by both SCA members and non-members.
3. The Society Seneschal will advise the Board when an anniversary opportunity exists and request a call for proposals be sent to the membership for action. The call for proposals should be submitted to the Board of Directors no less than 1 year before the date the proposals would be due. The initial due date for event proposals should be no less than 18 months and not more than 48 months before the desired event date.
4. Proposals for these events are collected by the Society Seneschal and accepted by the Board of Directors.

**E. PROPOSAL CHECKLIST SOCIETY ANNIVERSARY EVENTS (SEE SECTION XXIII)**

**F. PROPOSAL APPROVAL AND ACCEPTANCE**

**1. Society Anniversary Events**

- a. The Society Seneschal will distribute the proposals to the Society Officers for review for 30 days. Any comments will be collected by the Society Seneschal and added to the proposal information.
- b. The Society Seneschal will review the proposals for completeness, request any missing information, and create a completed proposal packet for each proposal.
- c. The Society Seneschal will forward the completed proposals to the Board of Directors along with analysis and recommendations regarding the proposals.
- d. The Board of Directors will review the proposals and take one of the following actions:
  - i. Award one or more of the proposals.
  - ii. Direct the Society Seneschal to obtain additional information on one or more of the event proposals.
  - iii. Extend the deadline and call for additional event proposals.
  - iv. Elect not to award a proposal for that given event opportunity.
- e. Once the Board of Directors has awarded one of the proposals, the Society Seneschal will take the following actions:
  - i. Inform the key contacts of the successful proposal.
  - ii. Inform the key contacts of the unsuccessful proposals.
  - iii. Inform the other Society Officers.
  - iv. Inform the Kingdom Seneschals.
  - v. Issue a warrant for the Event Steward(s) as Deputy Society Seneschal(s).
  - vi. Once the Board of Directors has awarded one of the proposals, the Society Exchequer will issue a warrant for the event Exchequer as a Special Deputy until 6 months past the end of the event.

**2. Known World Collegia and Symposia**

- a. Each Society Officer will make a policy regarding how events focused on their joint or several venues are to be awarded. Once a Known World Event proposal has been awarded, the sponsoring Officer will inform the Seneschal of the Kingdom hosting the event. It is the responsibility of Society Officers to coordinate Known World Event activities to minimize scheduling and resource conflicts.
- b. Exchequers for Known World Events will be warranted as deputies to the Exchequer of the Kingdom hosting the event.

**3. Known World Summit Meetings**

Each Society Officer will make policy regarding how and when summit, or business, meetings with high-level staff and Kingdom Officials are required, planned, and held.



**G. BEFORE THE EVENT**

1. Status reports. The Event Steward will prepare a quarterly status report. For Anniversary Events, it will be sent to the Society Seneschal and the Seneschal of the Kingdom hosting the event. For Known World Events, it will be sent to the Society Officer involved and the Seneschal of the Kingdom hosting the event.
2. Financial reports. The Event Exchequer will prepare quarterly and yearly financial reports. For Anniversary Events, it will be sent to the Corporate Treasurer, Society Exchequer, and the Exchequer of the Kingdom hosting the event. For Known World Events, it will be sent to the Society Officer involved and the Exchequer of the Kingdom hosting the event.
3. Advertisement. Each Event will be allowed to print one full page or two half-page advertisements in all Kingdom Newsletters without charge. Kingdom Newsletters may require a payment to print advertisements over this allocation.

**H. AFTER THE EVENT**

1. Event summary report. After the Event has taken place, the Event Steward will file a final report with the Society Seneschal's office no later than 90 days after the event. This reporting package will include full operational report of the event, with a financial summary. This report will copy the Seneschal of the Kingdom hosting the event. For Known World Events, this report will also be sent to the Society Officer involved.
2. Financial report. The exchequer will file a final report with the appropriate Exchequer's office no later than 90 days after the event. This reporting package will include full financial reporting for the event. For Known World events, this report will also be sent to the appropriate Society Officer. If the event used a separate bank account, reports will continue to be filed until the account is closed and any money remaining is transferred to another SCA branch or the Corporate Office.
3. Postmortem report. The Society Seneschal and Society Exchequer's Office will jointly conduct a lessons learned effort for the event within 60 days of receipt of the final event reports. They will create a report distributed to the Society Officers and the Event Stewards, to be included in a lessons-learned knowledge database for future Society events.
4. Document retention – Follow the SCA Document Retention Policy
  - a. The following documentation, as a minimum, will be sent to the Society Seneschal for review and inclusion into the Society Event Knowledge base.
  - b. Copies of all Event proposals.
  - c. Copies of all quarterly Event status reports, including financial reports.
  - d. Copies of event wrap-up reports, including financial reports.
  - e. Lessons-learned Report.

**XVII. CHANGING AND MAINTAINING KINGDOM LAW****A. CHANGES TO CORPORA**

1. It is the responsibility of Kingdom Seneschals to keep informed about changes made to Corpora and about requests that the SCA Board of Directors makes for commentary on proposed Corpora changes.

2. It is the responsibility of Kingdom Seneschals to read the Board Minutes for changes to Corpora. Once a change to Corpora is approved, you are responsible for explaining these changes to your Crown and other Kingdom Officers and making sure your Kingdom Law and Kingdom Officer Policies are modified so they align with new corporate guidelines.

#### **B. CHANGES TO KINGDOM LAW**

1. Work closely with the Crown on proposed Kingdom (and Principality) law changes.<sup>61</sup>
2. Law changes must comply with Society rules. Kingdoms can be more restrictive, but not less restrictive than Corporate policies.<sup>62</sup>
3. Do not allow Kingdom law to encroach on modern law. The SCA cannot forbid nor permit anything it does not have the legal right to do; nor can it allow anything outside of modern law.<sup>63</sup>
4. Separate personal views from that of the governing documents; keep your formal written opinion as Seneschal to stating whether or not the required points are covered.<sup>64</sup> You may make recommendations to the Crown regarding changes you think are appropriate, but theirs is the final decision, subject to your evaluation of the legality of the proposed change.
5. As Seneschal, you cannot refuse to sign a law that is legal, regardless of whether or not you agree with it! You do not have veto power over the Crown's decisions unless what they want to do is contrary to Corpora, SCA policies, or Kingdom or real-world law.
6. Kingdom law must be signed by the Sovereign, Consort, and Kingdom Seneschal.
7. Changes to Kingdom law must also be proclaimed at a publicized event in accordance with Corpora.<sup>65</sup> The proclamation need not involve reading every syllable of the new law. Changes may be summarized in court as long as there are copies on site for people who wish to see the details. The more substantive the change, the more information about it should be given in Court.
8. Changes to Kingdom law must normally be published in the Kingdom newsletter before they go into effect.<sup>66</sup> In order to minimize the financial impacts of publishing high-volume, lengthy law changes/inter-kingdom event conventions, it is considered to meet publication requirements within a primary/affected kingdom if:
  - a. The entire text of the changes are published in the primary Kingdom Official Newsletter *\*or\**
  - b. The entire text of the changes are published on Primary Kingdom Websites in unchangeable formats with the additional stipulation that all substantive changes, as well as a URL to the location on the websites of all primary kingdoms, are published in Official Kingdom newsletters.

#### **C. MAINTAINING KINGDOM LAW**

1. You are required to review kingdom law on a regular basis as defined by your kingdom law.<sup>67</sup>
2. Double-check Principality law. Insist that Principality Seneschals review Principality law first for compliance with Corpora and Kingdom law. Principality Law must be signed by the Prince, Princess, and Principality Seneschal, as well as the Sovereign, Consort, and Kingdom Seneschal.

## **XVIII. MANAGING KINGDOM BRANCH CHANGES**

### **A. ESTABLISHING NEW BRANCHES**

#### **1. Setting Branch Geographic Borders**

- a. Branches should have physical justification—not political expedience. Branch spacing varies a lot among Kingdoms, but is often based on reasonable driving distance.
- b. Territorial branches must have clear borders.<sup>68</sup> ZIP or postal codes are the way the SCA, Inc. defines branch areas in most places. Whatever approach you develop should look reasonably contiguous on a map, regardless of postal code lines. Look at traffic patterns, town and county lines, and geographic features like rivers and mountains. Enlist the aid of local Seneschals in establishing or refining the area definitions for their branches. In the event of a dispute over which group has jurisdiction over a geographical area or postal code, check the membership listing for the area in question and learn the wishes of the members who reside there before making an assignment decision. Remember that cantons and ridings are by definition inside the borders of their parent baronies and provinces. However, even cantons and ridings should not produce ‘doughnuts’—if a subsidiary group should become independent, it should not be surrounded by another branch.
- c. Institutional branches must be based at real institutions. That is, Colleges must be based at institutions of higher learning and Strongholds at military institutions. This should be documented in the branch’s report. The SCA encourages establishment of institutional branches wherever appropriate, but the structure is not to be used as a way to get around territorial requirements for affinity-groupings of members. If most of the people in the branch are unaffiliated with the real-world institution which is its supposed base, the group should be designated a Shire (or Canton/Riding, if applicable). An institutional branch is a shell that exists independent of its population, so people can follow the demands of their studies or employers while the branch stays in place for members who move in as a result of similar transfers. It also provides a clear contact for the institutional authorities, which simplifies accounting for funds donated by the institution and allows the branch to adapt to institutional rules without affecting any larger SCA branch in the area. In addition, the institutional branch may make it easier to schedule SCA events in halls or grounds owned by the institution.
- d. Baronies and Provinces can sponsor and administer an institutional branch if the suitable institution falls within its immediate boundaries. If there’s no geographical branch holding the land, an institutional branch can exist independently—but it automatically becomes part of any geographical branch that later develops in the area. It’s simplest to regard a small independent institutional branch with flexible population requirements in each case.
- e. Basic financial reporting units may not usually cross state, province, or country lines.<sup>69</sup> The Society has to be able to report its financial results on a state-by-state (or international) basis, so Corpora prohibits any branch below Principality level from crossing a state line without a specific variance from the Society Seneschal. The Society Seneschal is extremely reluctant to grant such variances.

#### **2. Existing Claims to Branch Territory**

- a. Respect existing land claims when supported by activity. If a branch holds a piece of land for the SCA, it has to be consulted before a new branch can be formed there. However, a branch should have members and activities throughout the area it holds. If a town has no meetings or other SCA services within a reasonable drive and there are people there who want to organize them, give the branch that "owns" the town the choice between helping the locals and turning them loose. If the established branch is a barony or province, it may help to point out that creating a canton or riding does not negatively affect the old branch's population total, since the smaller branches remain part of it.
  - b. Be generous about recognizing existing land claims. "Claimed territory" is whatever the branch application says, if one can be found. If this cannot be found, go by the memories of long-term members and notes on meetings and events in old newsletters. It may well cause trouble if you ignore old claims, even if they're supported only by oral tradition. However, it is not necessary that every postal code in your Kingdom be assigned to an established group. It may be best to leave unpopulated, distant areas unclaimed in order to allow for future growth.
3. Creation of an Incipient Branch<sup>70</sup>
- a. Appoint the primary organizer as a Deputy Seneschal for the area. The job may be defined as your own deputy or as a deputy to whatever branch or regional organization your Kingdom has placed in charge of the general area where the new branch will be located. However, until the branch has official status, there isn't an entity to which people may be appointed as officers. Encourage the rest of the Kingdom officers to take the same approach.
  - b. Make sure they have access to SCA Corporate documents and handbooks. Kingdom law, the SCA Governing Documents (and affiliate governing documents where applicable), The Known World Handbook, and the Local Officer's Handbook are extremely important tools, and the information and documentation you can provide, the more effective local organizers can become. The organizers need personal contact with established branches and officers as well. It may be valuable to appoint a special Deputy Seneschal for Incipient Groups expressly to deal with the needs of new groups.
  - c. Set and enforce consistent event sponsorship policies. Incipient branches may not sponsor Society events. You can authorize the warranted deputies-for-the-area to hold local meetings in the name of the supervising branch, but do not let them put events on the Kingdom Calendar on their own. They need to find a sponsoring branch, and the sponsor needs to offer more than just their name; if at all possible, they have to provide a person to cover the event and make sure it follows SCA rules and procedures, and offer some financial support as well since incipient branches may not hold SCA funds. If necessary, a Kingdom or Principality can sponsor events for an incipient branch, but it is better for one of the neighboring branches to do so. Incipient status provides a training period for the new branch, and it will work best if they have a consistent presence.
  - d. Remember that only a branch with a Marshal can sponsor a fighting event, and waivers must be signed, collected, and sent in to the Kingdom! If the most practical sponsor doesn't have a Marshal or the paperwork and manpower to comply with waiver requirements, the incipient branch needs to go further, if need be to the Kingdom or Principality, to line up the appropriate coverage. An incipient branch

need not be exclusively sponsored by a single established group. Sponsorship could put a severe strain on the established group, both financially and in terms of personnel workload. Different events of an incipient group can be sponsored by different nearby groups. This not only spreads the work out, but it also enables the incipient group to become acquainted with more of its neighbors in the Kingdom.

- e. Keep the incipient period short. If a branch is not ready to leave incipency after two years, you should actively investigate why they are not ready.

#### 4. New Branch Petition Review and Approval

- a. You must review all branch petitions before they can be approved.<sup>71</sup> Per Corpora, you have the basic responsibility for deciding if a group meets the requirements for a branch and for advising the Crown accordingly. The Crown may refuse to establish a branch you have recommended, but may not establish one you have not approved. If the Crown wants to approve a branch against your recommendation to the contrary, refer the matter to the Society Seneschal.
- b. Consult the Society Seneschal before making any major change in existing borders.<sup>72</sup> Land claims can be tense enough that it might help to slow things down and take a second look before making changes. You should poll the members affected by the change to determine their wishes before proposing a change. If the change involves creating a canton, college, stronghold, or riding within the borders of an existing barony, and everyone is agreeable to this, you can proceed on your own. In fact, any boundary change that is generally agreeable to everyone affected can be done at the Kingdom level, provided you promptly inform the Society Seneschal of the change. However, if the change is controversial, you need to send it on to the Society Seneschal to look over. Also, remember that elevations to barony always require the Society Seneschal's approval.
- c. If the change involves nothing more than reassigning a postal code from one branch to another, and both groups involved are amenable, or if you want to add a previously unassigned postal code to a branch's defined area (as long as it is geographically contiguous with the existing boundaries), then you can make this change without consulting the Society Seneschal.
- d. When action from the Society Seneschal is required, your presentation to the Society Seneschal should include the following materials:
  - i. Your recommendations.
  - ii. A clear description of the old and new boundaries with postal codes, with a map if appropriate.
  - iii. Letters from the Seneschals of the branch or branches involved in the action. (Note: If any of them maintain they can't live with what you propose to do, you need very strong justification as to why it's necessary and they should be able to support and document their position.)

#### 5. Paperwork for New Branches (Below Barony/Province)

- a. Make sure each branch organizer has clear instructions regarding the expectations and milestones needed for the creation of the new branch.
- b. Keep detailed records on each new branch. Future Seneschals will need to know what territory the branch has, who started it, and when it achieved official status. It



may be helpful to make branch organizers draw their borders on a map, as well as giving you a list of postal codes (or other relevant boundaries).

- c. Make sure the College of Arms has approved the branch name. According to Corpora, an incipient branch can use a tentative name, but it can't get full status until the name is registered. Be sure incipient groups are aware of this requirement, and encourage them to begin work on their name and get it submitted as soon as possible.
- d. Make sure every group finds an acceptable name.<sup>73</sup> If you can show a consistent good-faith effort by a group to register a name over a long period of time, and the College of Arms has rejected their every attempt, you can apply to the Society Seneschal for a variance to allow the group to become official without a registered name.
- e. Give the branch a detailed record of its territory. When you decide that a branch is ready for official status, make any necessary adjustments to the borders and postal codes shown on their branch application. Note the date the Crown declares them a full-status branch of the SCA, and give them a signed copy for their records.
- f. Notify the Society Seneschal of new official branches.<sup>74</sup> Please use the following format: Branch name (modern location), branch type, month, and year of status. Send this notice after the deed is done. Plans are subject to change, so the Society Seneschal has no interest in an incipient shire that is probably going to be made official next month. It's not real until its existence has been read into the record at a Board meeting.
- g. Here's a summary of what must be done in order for a branch to become official or full-status. These things are usually done in the order listed.
  - i. The Kingdom Seneschal must approve the petition. At this point, the branch must start functioning as an official group, with officers, reports, etc.
  - ii. The Crown must recognize the new branch in Court.
  - iii. The Society Seneschal must be informed of the branch's existence.
  - iv. The branch's status must be recognized by the Board of Directors.

## **B. CREATION OF A BARONY (OR PROVINCE)**

1. The formal minimum requirements for baronial or provincial status are given in Corpora.<sup>75</sup> This is a description of what a Kingdom Seneschal has to do to make sure that the Board will not overturn a baronial/provincial creation for lack of paperwork or improper procedure.
2. Baronies and provinces are large branches within and subject to the administration of a Kingdom (and Principality, if any). They are alike in status and in the ability to administer other branches within their borders, but differ in that baronies possess ceremonial representatives appointed by the Crown and therefore have the ability to administer Baronial awards, while provinces do not.<sup>76</sup>
3. A branch or contiguous group of branches may petition for baronial or provincial status at the members' option, subject to the approval of the Crown and (if applicable) the Coronet, if the resulting entity meets the requirements listed below.
  - a. At least 25 paid members in good standing. Strive for double that.



- b. A set of officers acceptable to the Crown (and Coronet, if applicable).
  - c. A name and device registered with the College of Arms.
  - d. Consensus favoring advancement in branch status, and favoring the type of branch (barony or province) specified in the petition. (Note: If the branch is to be a barony, arrangements shall have been made with the Crown at the time of application for baronial status to select and appoint a Baron and/or Baroness in accordance with Kingdom law and custom.
  - e. A strong record of activity in a variety of fields of Society endeavor.<sup>77</sup>
4. At least 25 paid members in good standing means that there are enough members, more than the minimum of 25, to ensure that the group has sufficient diversity and adult participation to be sustainable moving forward. Here are some questions to ask when considering whether membership is strong enough to sustain a new SCA group:
    - a. Are the paid members from different families, households, areas of the postal codes being claimed? Will the branch lapse below 25 if one family moves and another lets its memberships lapse?
    - b. Do the paid members have a diversity of SCA activities and interests (arts and sciences, service, combat, archery) or will the branch lapse if one area of interest is discontinued?
    - c. Do the officers of the group come from different families and households?
    - d. How long have the members been playing?
  5. A set of officers is generally considered to consist of the Great Officers required to run the group: Seneschal, Exchequer, Herald, Marshall, Chronicler, and Minister of Arts & Sciences. A Chirurgeon may not be required for any branch below the status of Principality. Other offices may be required at Kingdom option. The key item in evaluating the group's officers is whether the group has a successful history with each of the required offices functioning and reporting, and whether their superior officers feels the officer position is working in the group.
  6. Unless the history is exceptional and well documented, the requirement for a registered name and device will not be waived for baronial/provincial advancement.
  7. A strong record of activity means that there are regular meetings and practices, that the branch does not cater only to one specific SCA interest group (fighters, artists, etc.), that demos are done as appropriate, that the branch holds events on approximately the same frequency as other baronies/provinces in the Kingdom, and that people from the branch participate in other branches' events. A branch whose residents never venture outside their area is not ready to be advanced; this may be discounted in the case of geographically isolated groups where travel to other branches is especially difficult.
  8. There must be a consensus in polling the area. This can be done by a mailing to the members, or by passing a petition around a meeting. The entire paid member population of the area must have a chance to comment (generally, in writing) on the proposal. The petition or poll must be unambiguous. Each page of signatures or each letter must include a preprinted explanation of what the signatures mean. This may take the form of a heading declaring that the undersigned all want a certain stated course of action, or it may involve columns for noting support, opposition, or indifference for a stated course of action.

9. Make sure that the people who signed the poll knew what kind of branch they were petitioning for, and in the case of a barony, that they knew how the first Baron and/or Baroness would be selected. It is best if this information is included on the petition or polling letter. Make sure that the petition or poll indicates membership status, which must be checked against a Registry list.
10. The Corporate Office can provide labels for a polling mailing. The Kingdom Seneschal should either order the set on behalf of the poll organizers or email or fax an authorization to the office authorizing the release of the labels to a specific person. There is no charge for the service. The request should specify the postal codes (in numeric order, giving ranges rather than individual codes where possible) to be included in the label set. Branch pollings as a rule must include all paid members in good standing of any type within the boundaries of the area being polled, and the Corporate Office requires that the labels be used within 10 days after they are issued. Persons who actively play in the area but live outside it may be polled at the discretion of the Kingdom Seneschal.
11. The members polled must understand that a petition or polling is not a vote! It is merely a way for the Kingdom Seneschal to assess the opinions of the people. The Seneschal will decide whether to recommend advancement of status. When you evaluate a poll, look for the following points:
  - a. A substantial majority of the Society members in the area must have responded to the poll. Make sure everyone is informed of the polling.
  - b. A substantial majority of the response must be favorable. You want general support from the people in the area, not a household power trip.
  - c. The opposition must not be convincing. If there are more than two or three people against the change—that is, negative instead of neutral, find out what their reasons are and consider them carefully before forming your own conclusion.
  - d. Non-member support can't replace member indifference or opposition. While non-members may be allowed to express an opinion, the gathering the wishes of the paying members is crucial.
12. The Kingdom Seneschal should also gather input from the other Kingdom officers, the Crown, and the Seneschals and ruling nobility in adjacent branches for their feelings on the proposed branch elevation.<sup>78</sup> Especially ask the superior officers whether they feel that the branch officers are capable of handling the changed responsibilities.
13. As Kingdom Seneschal, it is your responsibility to prepare a detailed package for the Society Seneschal's review.<sup>79</sup> Give the Society Seneschal your considered opinion as to whether or not the branch is ready for advancement, plus at least the following items:
  - a. A statement from the Kingdom Seneschal that the membership thresholds have been met.
  - b. A summary of the petition/polling process, with a copy of the petition or letter and a breakdown of the voting, separated into subscriber/other member/non-member.
  - c. A list of the proposed postal codes (or other boundaries for international groups), especially if there are any changes being made.

- d. Statements from local and Kingdom officers, the royalty, and the neighbors supporting the advancement. The Kingdom officers should also give their opinions of the local officers.
  - e. The branch's own explanation of why it is ready to advance, along with a brief summary of activities in the area.
  - f. A plan for selecting the first Baron and/or Baroness, if the branch will be a Barony.
14. Occasionally a group will express a desire to become a Palatine Barony. A Palatine Barony is a barony that selects its baron and/or baroness periodically via some sort of competition: a tournament, an arts competition, or sometimes some combination of competitions. Palatine Barony status is used, extremely rarely, for groups that are remote enough from the rest of their Kingdom that they are unlikely to be able to participate regularly in the Kingdom's pageantry. If a group seeks Palatine Barony status, consult the Society Seneschal before proceeding.

### **C. PRINCIPALITY AND KINGDOM ELEVATIONS**

1. Work with the Society Seneschal from the start.<sup>80</sup> Principality and Kingdom elevations are rare and too individual for specific procedures to be useful, but you need to make sure that they include a comprehensive polling and review process (see instructions under Creation of a Barony). Any minority opinion must be addressed—the smaller group is not necessarily wrong, and a serious attempt to deal with their objections will do a lot to draw them into the life of the new realm. For a Principality or Kingdom polling, the Registry will prepare a set of labels at your request. Just specify the postal codes to be included. You may release these labels to the poll organizers, with the warning that they are to be used only for the poll itself, and that they must be used within 10 days.
2. Prepare a detailed package for the Society Seneschal's review.<sup>81</sup> Give the Society Seneschal your considered opinion as to whether or not the group is ready for advancement, plus at least the following items:
  - a. A description of the polling process, including dates and copies of the information sent out to explain the poll.
  - b. The detailed results of the polling, including any areas where opinion runs strongly counter to the rest of the proposed Kingdom or Principality.
  - c. A map showing the borders of the proposed Principality or Kingdom.
  - d. A list of postal codes to be assigned to the new realm. Where possible, these should stick to 3-digit (known to the post office as SCFs) breaks. You must list all SCFs to be included in the new Kingdom, and all individual ZIP codes so affected if the new Kingdom is not claiming the entire SCF regardless of whether anyone lives there at the moment or not! Outside the USA, where the SCF doesn't apply, then the appropriate divisions of the postal code should be used.
  - e. If all or part of the proposed Principality or Kingdom lies outside the US, you will need to work with the Society Seneschal to determine the appropriate way to designate territory.<sup>82</sup>
  - f. Statements from officers supporting the change in status.<sup>83</sup> For a Principality, include letters from at least the Earl Marshal, Kingdom Exchequer, Principal Herald, Minister of Arts/Sciences, and Chronicler, indicating their confidence in the area's

ability to operate at the new level. All the parent Kingdom's officers should comment on a proposed Kingdom elevation as well as their Corporate counterparts.

- g. Draft Law to be presented to the victors of the first royal Lists.<sup>84</sup> (Note that the victors may choose to adopt different laws than the draft presented; this is their right as royalty.)
  - h. Financial Policy for a potential Kingdom, and a plan, if applicable, for any asset transfers to the potential Kingdom.
  - i. A date (or a range of dates) for the first Coronet or Crown Lists, and a statement regarding the plans for establishing the first set of royalty. Some realms choose a field-side investiture immediately after the Lists, while others prefer to hold a separate event. Either approach is acceptable, but the choice should be made well in advance, so no one is taken by surprise.
  - j. For a Kingdom, statements from the Crown and Coronet supporting the transition plan, and the entry conditions for the tournament—or your explanation of the reasons why they weren't able to reach an agreement.
  - k. For a Kingdom, a plan for the transition of the newsletter from 'unofficial' status to that of a newsletter covered by SCA membership.<sup>85</sup> This includes getting the necessary mailing permits, etc.
  - l. To avoid outside adjudication, Crown Lists and Coronation plans must be acceptable both to the new Kingdom and to its parent. The parent Crown, the new Crown and the last Coronet should settle on a format for the tourney and the release of the new Kingdom. Their Seneschals, Marshals, and Heralds should all contribute to a smooth and gracious agreement—and you are a key player in the process. If there's no resolution, Corpora gives the final choice to the Society Seneschal and the Board.
3. Use "Crown Principality" status to recognize regional development. Where an area is obviously suitable for eventual Principality status, a Kingdom can reward and encourage the trend by declaring the area to be a Crown Principality. A Crown Principality is exactly and only a region with a fancy name and a line in the Coronation ceremony—the Sovereign and Consort also become Prince and Princess of the pseudo-Principality when they assume the thrones. It has no laws but the Kingdom laws. Its officers are regional deputies to the Kingdom officers. However, the name lends it extra emotional reality. The Kingdom can allow it to develop some customs of its own which will smooth the eventual transition.
  4. All the procedures for creating a Crown Principality are under Kingdom control, as long as the Kingdom doesn't attempt to hand over functions reserved to the royalty or officers of SCA Principalities. (That is, the ceremonial representatives for the Crown within a Crown Principality may NOT warrant subordinate officers, proclaim banishments, or bestow armigerous awards without specific Crown approval for individual recipients.)
  5. Please be cautious with the idea, and do some polling before advising your royalty to establish a Crown Principality.

#### **D. BRANCH SUSPENSION**

1. The Kingdom Seneschal may suspend a branch for just and stated cause. The conditions under which a suspension will be lifted should be defined in writing for the group at the time it is imposed. Whenever possible, a status review date on which the

suspension will be reconsidered should also be defined and announced to the group. In no cases should suspension or abeyance last longer than 6 months without a review of the suspension. A branch that has been put into suspension or abeyance for financial reasons may not handle money in the name of the SCA until the problems are corrected.

2. A suspended branch may not handle money. If a branch fails to turn in its financial report in time to be included in the Kingdom report, the SCA report for the year is affected. The sanctions must prevent them from receiving or spending funds in the name of the SCA until they are restored to their full place in the Kingdom. Work with your Kingdom Exchequer to be sure that you have a procedure for keeping track of their prior assets, and for helping them survive the period of suspension. Note that the Exchequers' Year-End Reports (for branches within the U.S.) are compiled to form the SCA annual report to the IRS, and failure to file this report (by any branch) can imperil the SCA's tax-exempt status.
3. Suspension is better as a threat than as a penalty. A branch very rarely goes into suspension because of a problem caused by all its members. When you apply penalties to a whole branch, you may reduce the quality of life in the SCA for a group of innocent members and potential members because of the carelessness or ill fortune of a few officers. You need to have sanctions to apply to a branch--but they should be a last resort, used only when reminders, replacement of officers, and offers of help have all failed to locate someone who can meet the requirements.

#### **E. BRANCH ABEYANCE (DORMANCY)**

1. The Society Seneschal may take the recommendation of a Kingdom Seneschal and recommend that a group go into abeyance status if a majority of the group members have been assigned to other activities (i.e. military service and deployment and are away from the area for a period of time longer than three months).
2. The Society Seneschal may take the recommendation of a Kingdom Seneschal and recommend that a group go into abeyance status if a majority of the group members have been affected by natural disasters such as severe flooding or a direct hit from a hurricane or tornado and are in need of extended time to rebuild.
3. During this time the group will go dormant and the kingdom will recognize the group as being in abeyance status. When a group goes in abeyance, the group's bank account will be turned over to the kingdom to maintain until which time the group is out of abeyance or the group is dissolved due to lack of activity or interest. All heraldry will be maintained by the group throughout the abeyance. It will be the responsibility of the Kingdom Seneschal to report for the group while in abeyance status. The group may remain in abeyance status for up to two years. At this time, the status will be reviewed and either extended or revoked and the group will be dissolved. If the group is dissolved, all funds currently being handled by the kingdom will revert to the kingdom.

#### **F. LATERAL BRANCH CONVERSIONS**

1. Lateral conversions include those between shire or canton and institutional branch and vice versa, and those between barony and province. They also include changes between shire and canton. You should consult the Society Seneschal regarding any questionable lateral conversions.<sup>86</sup>
2. You must, at a minimum, poll the membership (paid members in good standing) of the affected area prior to a lateral change. Especially at the baronial or provincial level, you need to be as sure of the wishes of the membership as you would be for an elevation to



that status. Kingdoms may also elect to create policy that allows polling persons who participate in the branch but are not paid members living within the confines of the branch. The polling must reflect that a compelling majority of the paid membership within the boundaries of the affected area are in favor of the proposed change.

3. Try other alternatives before making a barony into a province, unless the branch actively chooses this change. If a barony runs into trouble selecting new ceremonial heads, the Crown can appoint a vicar as an interim measure or take over as Baron and Baroness directly for a while. Before you agree to propose an outright status change, make sure that the people of the barony understand that baronial awards will be closed while the branch is a province—this may give them the incentive to resolve their differences. (Existing provincial awards were grandfathered when the 1989 Corpora was adopted. That privilege does not extend to provinces formed after that time, whether established as provinces or converted from baronies.)

#### **G. BRANCH DEMOTION OR DISSOLUTION**

1. Remember that while a Kingdom Seneschal can dissolve an incipient branch for cause, all other branch demotions and dissolutions must go to the Society Seneschal (and be upheld by the Board) for approval. Once a branch has advanced beyond incipient and gained official status, only the Board upholding a decision by the Society Seneschal can lower that status or take it away, per Corpora.
2. Demotion or dissolution of an SCA group that has gained official status is a last resort. Work with the people in a branch as long as it looks like there's any chance of saving it. Warn them before you recommend dissolution, and listen to the justifications they offer for staying in operation. In isolated areas, it may be possible to sustain a branch's status with fewer members than normally required—check with the Society Seneschal if you think a variance might be desirable.
3. Once you have decided that dissolution is the proper course of action, you will need to present the reasons, in writing, to the Board and the Society Seneschal.<sup>87</sup> When you set up the case for the Society Seneschal to give the Board, include good reasons, and the efforts already made to correct the problems. If population is low, give numbers at intervals to show that it's been low for a good while and is unlikely to recover. If the problem is lack of interest, define it in terms of inability to fill offices or file financial reports. If interpersonal problems have seriously damaged the SCA's reputation, describe specific incidents, and include letters or news stories from the area if you have them.
4. In order to be this specific, you have to know what's been going on. Dredging up old records in order to reconstruct population and reporting history is very difficult. Count your branches every year or so from the current ZIP code list, and keep a central tally of how they're doing.

## **XIX. INSURANCE MATTERS**

#### **A. REGIONAL APPLICABILITY**

1. The following information applies only within the SCA, Inc. Within affiliates, different insurance arrangements may exist and local procedures should be followed.



**B. INSURANCE GUIDELINES**

1. Most site owners require some sort of evidence that the SCA, Inc. has liability insurance. To provide documentation, the "Proof of Insurance" certificate is distributed to Kingdom Seneschals toward the end of each year. Promptly distribute the new form to your branch Seneschals, and have them destroy the old forms.
2. An "Additional Insured" Certificate may be requested for those site owners who require a higher level of protection. It specifically names the site/owner/managing organization as additionally insured on the SCA, Inc.'s policy. An "Additional Insured" certificate can be obtained from the Insurance Coordinator at the SCA national office—place your order at least 6 weeks in advance of the event. It is preferred that this fee be paid with a branch account check.
3. A special insurance fee must also be paid to activate the SCA Equestrian Policy whenever equestrian activities are scheduled for an event. The fee and request should be sent to the Insurance Coordinator at the SCA national office 6 weeks in advance of the event. If you also need an "Additional Insured" certificate for the site owner, an additional insured certificate is also required. It is preferred that this fee be paid with a branch account check.
4. Try to avoid claims. Call the Society Seneschal if it looks as though a claim may need to be filed and remember that there is a deductible.
5. Remind people that the SCA insurance does not cover participants for injuries to their person or damages to their personal property. This is why the SCA requires waivers, which offer protection for the Corporation and its officers. However, a site owned by an SCA member is covered for property damage the same way any other site is covered.

**C. THE SCA'S GENERAL LIABILITY POLICY**

Our General Liability Insurance covers the negligent acts of the SCA for third-party bodily injury and property damage, excluding participants, subject to policy conditions, exclusions, and limitations. Please note: vandalism is not covered by our policy. If damage to someone's person or property was willful or otherwise intentional, the SCA is not covered.

**D. THE SCA'S DIRECTORS' AND OFFICERS' LIABILITY POLICY<sup>88</sup>**

1. The purpose of Directors' and Officers' Liability Insurance is to provide the SCA and its officers and agents with insurance coverage for legal defense required to respond to lawsuits that name the SCA or its officers. Specifically, our Directors' and Officers' Liability Insurance covers insurance when actions are filed for wrongful acts, defined as, "...any actual or alleged act, error, omission, misstatement, misleading statement, neglect or breach of duty by the organization or by the individual insured in the discharge of their duties..."
2. The important factor is that all warranted officers and their agents are covered by insurance, and not just the Board of Directors and the officers at the Corporate level—all warranted officers of the SCA at all levels are covered within the bounds of performing their office in the SCA.

**E. HOST LIQUOR COVERAGE**

1. The SCA's US General Liability policy provides coverage for claims relating to the incidental use of alcohol at events, but not if we go into the business of selling or serving

alcohol. Specifically, the SCA cannot manufacture, distribute, sell, serve, or furnish alcoholic beverages. Hence, SCA-sponsored taverns are prohibited.

2. Further, SCA funds may not be used for the purchase of potable alcohol, except for that needed for use in cooking.<sup>89</sup> This issue differs in countries outside of the US and will be addressed via stated policy per country. Policies for other countries other than the US should be included as a part of relevant individual Kingdom Law.
3. The following section refers to the US only. A site may provide a bartender for an event who may sell alcohol or liquor pursuant to site and jurisdictional restrictions. This bartender may not be a participant at the event in any capacity outside the sale of alcohol, and will preferably be a non-member. No part of the revenue from these sales may go to any SCA group or member (except if that member should independently be the owner or operator of the site). The sponsoring group should provide no oversight or direction to him save through the site owner/operator.

#### **F. EQUESTRIAN COVERAGE**

1. The SCA Corporate office must be informed each time the Equestrian Insurance Policy is to be activated for an SCA event, and a special insurance fee must be paid. The fee and request should be sent to the Insurance Coordinator at the SCA national office 6 weeks in advance of the event. If the site owner also wishes to be named as an additional insured, an "Additional Insured" certificate is also required. A significant, additional late fee may apply if you do not order in a timely manner.
2. Once the equestrian insurance coverage is activated, the following must be done for the insurance to apply for an event:
  - a. Any person participating in the SCA equestrian-related activities, including riding or authorization check rides, horse handling, ground crew, mounted games and combat, marshaling, or being present at equestrian activities as an observer, is required to sign a Society for Creative Anachronism, "Waiver And Informed Consent to Participate in SCA Equestrian Activities" form or roster. Since anyone at an event may end up being an observer EVERYONE at an event should sign the waiver
  - b. The special equestrian signage explained in The SCA Equestrian Handbook must be displayed where the equestrian activities are conducted.

#### **G. INSURANCE RELATED CLARIFICATIONS**

1. Do I need to do anything to get liability coverage for my branch's published event?

No. Our coverage applies equally to all SCA-sponsored activities. You do not need to do anything unless the site owner requests proof of insurance and refuses to accept the Society's letter describing the policies. Exception: If it's an equestrian event, you must order an insurance certificate from the Insurance Coordinator (there is a fee for this) see <http://www.sca.org/docs/insurance.html>.

2. Should I offer to have the site owner named as an additional insured?

No. A site owner must specifically state in their contract if they need to be added as an additionally insured.

3. What should I tell a site owner about our insurance?

If you're asked if we have coverage, say "yes." If the site owner wants something from the broker, cooperate and tell him you will provide a "Proof of Insurance" certificate, and do so. A certificate naming the site owner as additional insured can be issued, but wait for them to request it.

4. How do I avoid last-minute panic about insurance?

When you reserve a site, ask about all the details you will need to know even if insurance is not a factor. Read the contract if there is one. If insurance has not been mentioned, ask, "So that's everything we need to do..." or "Is there anything else you need from us?" The above queries will most likely bring out any insurance questions.

5. What happens if you need an "Additional Insured" certificate from the SCA office?

Request it at the same time you send your flier to your Kingdom newsletter. See [www.sca.org](http://www.sca.org) for instructions. If a site owner wishes to be specifically named as additional insured, you can order an insurance certificate for a processing fee. The fee must be sent at the time the certificate is requested. Processing will not begin until the fee is received. If a site owner wishes simply to be the Certificate Holder without being named as Additionally Insured there is no fee for this document

6. Whenever horses will be present at an event, whether there is an additional insured or not, there is a fee required.

7. If fireworks or fire arts are performed, Society Seneschal approval and outside insurance coverage is required. The local groups are responsible for 100% of the cost and responsibility for this additional policy. Fire Arts, which include but are not limited to fire-walking, fire-breathing, explosives, and pyrotechnic displays may not be conducted as an SCA sponsored activity at events, demos, practices, or formally recognized gatherings. Variances must be requested of the Society Seneschal in writing and only take effect when granted in writing by that office. The Event site will pay for any additional insurance needed.

8. A single "Additional Insured" certificate or equestrian policy activation can cover a range of dates at a particular site (e.g., fighter practices). Consult with the Insurance Coordinator for more details on how to make use of this feature.

#### H. ORDERING INSURANCE CERTIFICATES

1. Always include your legal name and your daytime phone number.
2. Allow at least 60 days and preferably 8 weeks for the request to be processed. A late ordering fee will be charged for certificates requested fewer than 30 days before the event. If you can supply a letter from the site owner, on letterhead, stating that the reason for the delay is due to late notification by the site, you may get a refund of the late fee at a later date. However, the late fee must still be paid along with the certificate fee.
3. Visit <http://www.sca.org/docs/insurance.html>. Provide the requested information, on a separate sheet of paper for each certificate requested. If you have questions, call the Corporate Office for clarification.

**I. ORDERING FEES**

1. General Liability Policy. If someone is to be named as Additional Insured there is an additional fee. If no additional insured is requested, the certificate is free. The fee must be received with the request. Processing will not begin until the fee has been received. It is preferred that this fee be paid with a branch account check
2. Equestrian Policy. Each time the Equestrian Policy is activated, whether there is additional insured or not, there is a fee. If the site owner wishes to be named as an additional insured, there is another additional fee. The fee must be received with the request. Processing will not begin until the fee has been received. It is preferred that this fee be paid with a branch account check.
3. Late Fee. If you do not adhere to the 30-day ordering period there will be a late ordering fee charged. Occasionally, the site will delay requesting a certificate and the fee may be waived by providing the Corporate Office with a letter from the site owner (on letterhead) detailing the cause of the delay. However, the late fee will still need to be sent with the certificate fee, and will be refunded after the site owner's letter has been reviewed

**XX. OVERSIGHT OF SOCIETY-OWNED TRAILERS****A. REGIONAL APPLICABILITY**

1. This section applies only within the SCA, Inc. Check local policy for registration and insurance arrangements in affiliates.

**B. MAINTENANCE OF RECORDS**

1. Each local branch, group, office, guild, or other officially recognized group (hereafter referred to as a "group") of the SCA that owns a trailer that is registered in the name of any group of the SCA must maintain all records as noted below.
2. When the vehicle is purchased:
  - a. The Group should retain copies of the title, the current registration and current "proof of insurance" in the group's Exchequer files.
  - b. The Group should retain copies of the title, the current registration and current "proof of insurance" in the group's Seneschal files.
  - c. The Group should retain copies of the title, the current registration and current "proof of insurance" in the group's Regalia Officer files (if applicable)
  - d. The Group should report the purchase of the trailer to the SCA Corporate office by sending a copy of the registration and current "proof of insurance" to the vehicle to the corporate office.
  - e. It is the responsibility of the group to obtain and maintain insurance for this SCA asset.
3. When the vehicle is sold:
  - a. Retain the bill of sale in their group Exchequer files.

- b. Retain a copy of the bill of sale in their group Seneschal files.
- c. Retain a copy of the bill of sale in their group Regalia Officer files (if applicable).
- d. Follow the procedures listed below to report the sale of the trailer to the SCA Corporate office so SCA insurance can be cancelled for the trailer.

#### **C. PROCEDURE FOR REPORTING THE PURCHASE, REGISTRATION, INSURANCE OR SALE OF SCA OWNED TRAILERS, VEHICLES OR WATERCRAFT.**

Each branch, group, office, guild or other entity which is a part of the SCA (hereafter referred to as a "group") of the SCA that owns a trailer or any other vehicle or watercraft that is registered in the name of any group of the SCA, must send a copy (a copy, not the original) of the current registration to the Corporate Office. The Vice President of Corporate Operations or their designee will retain a copy of the current registration along with a copy of the current "proof of insurance" for our files. You are directed to send a copy of the trailer, vehicle or watercraft that is registered in the name of the SCA as well a copy of the current "proof of insurance" to the following address within 30 days of obtaining registration:

SCA Office Address for Trailer Registrations:  
Insurance Certificate Coordinator  
Society for Creative Anachronism, Inc.  
P.O. Box 360789  
Milpitas, CA 95036-0789  
(800) 789-7486 or (408) 263-9305  
(Mon–Thurs 9 am–4 pm)

#### **D. TRAILER INSURANCE**

All trailers, vehicles or watercraft purchased and owned by the SCA must be registered to the SCA group and must be insured by the SCA group at their own expense. The group must also send A COPY OF THAT REGISTRATION MUST BE SENT TO THE CORPORATE OFFICE WITHIN 30 DAYS OF REGISTERING SAID TRAILER ET AL.

Do not register the group's trailer in the name of an individual or an officer of the group. If a third party's person or property is damaged as a result of an accident involving a trailer when being towed, the individual who is towing the trailer bears responsibility for liability when the trailer is in transit and should contact their insurance carrier. It is the responsibility of the seneschal of the group that owns the trailer to check to make sure that the tower/driver of said trailer has the appropriate motor vehicle liability insurance annually. Some groups own a trailer that is used for storage only, i.e. it never moves from the storage site. If the state authority requires said "stationary" trailer to be registered, the group is responsible to follow the procedure as outlined above, i.e. a copy of the registration must be forwarded to the corporate office within 30 days of registration.

## **XXI. REGISTRATION AND LEGAL AGENTS**

### **A. REGIONAL APPLICABILITY**

1. This section applies only within the US and Canada.

### **B. STATE AND PROVINCE REGISTRATION**

1. The Society for Creative Anachronism, Inc. is incorporated as a non-profit corporation in California, and is registered to do business in all states and provinces where required by local law.
2. There are subsidiaries of the SCA, Inc. incorporated in various states. These incorporations are for corporate legal reasons and have no effect on “game side” activities. These subsidiaries affect no officers except at a Corporate level. Reporting by all officers should go up the standard chains of command.

**C. LEGAL AGENTS**

1. The SCA, Inc. has retained a corporation to act as its legal agent in all states for the purposes of receipt and service of legal documents. If any Society officer receives any official legal document naming the SCA or any branch requiring response or discussing legal action should report such to the Kingdom Seneschal who will report it to the Society Seneschal.

**D. NONPROFIT STATUS**

1. The Society is recognized by the United States Internal Revenue Service under Section 501(c)(3) of the United States Internal Revenue Code.



## XXII. REPORTING INDEX

What	To Whom	When
Updated copies of Kingdom and Principality Law	Changes must be published in Kingdom Newsletter. Copies must be available to populace from Kingdom & Principality Seneschal. Copies of changes must be provided to Society Seneschal & Kingdom Ombudsman	After the change has been reviewed by the Seneschal and approved by the Crown, and after the change has been announced
Kingdom and Principality Officers Policies	Changes must be published in Kingdom Newsletter. Copies must be available from Kingdom and Principality Officer. Copies of changes must be provided to Society Superior as appropriate.	After the change has been announced to all branch officers
Local Jurisdiction Policies	Available from Seneschal of group	After the change has been announced to the branch
Resumes for applicants to the position of Kingdom Seneschal	Society Seneschal	Before the final selection is made at Kingdom level.
Kingdom Seneschal's Warrant	Society Seneschal	After it has been signed by the Crown and as soon as possible after you have been approved by the Society Seneschal
Kingdom Seneschal Quarterly Report	Society Seneschal and your Crown	15th, March, June, September, December
Notification of winner of Crown lists	Society Seneschal	As soon as is reasonable after the event
Impending Royal or KS Administrative Sanctions	Society Seneschal	As soon as is reasonable after the decision
If you called fire, police, or EMS to an event	Society Seneschal	As soon as is reasonable after the event
Threatened lawsuit	Society Seneschal, President, Corporate Office	As soon as is reasonable after the event
Financial irregularities (theft, embezzlement, etc.)	Society Seneschal	As soon as is reasonable after the event
Violations of Rules/Laws by Crown or Great Officers	Society Seneschal	As soon as is reasonable after the event
The dissolution of an established branch	Society Seneschal	Before you announce it to the group; this must have Board approval
The existence of any new branches or lateral changes	Society Seneschal	As soon as is reasonable after the group has been recognized in court
Changes to your ZIP code assignments by the USPS or changes you have made in your Kingdom	Society Seneschal	In your next Quarterly Report
Bids or proposals for KW events	Society Seneschal	After approval by Kingdom Financial committee
Pulled SCA Sponsorship from an Event	Society Seneschal and Kingdom Ombudsman	As soon as is reasonable after the event
You need to file a claim against the SCA's insurance	Society Seneschal and Corporate Office.	As soon as is reasonable after the event

## XXIII. PROPOSAL CHECKLIST FOR SOCIETY ANNIVERSARY EVENTS

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Site location</li> <li><input type="checkbox"/> Full address, including State/County/Municipality of the site.</li> <li><input type="checkbox"/> Contact person at site for questions</li> <li><input type="checkbox"/> Distance to closest major airport</li> <li><input type="checkbox"/> Shuttle service availability and rates</li> <li><input type="checkbox"/> Public transportation availability and rates</li> <li><input type="checkbox"/> Relationship to highway system</li> <li><input type="checkbox"/> Location of closest hospital</li> <li><input type="checkbox"/> EMS response time to site</li> <li><input type="checkbox"/> Trauma level</li> <li><input type="checkbox"/> Walk-in clinic or urgent-care center available nearby</li> <li><input type="checkbox"/> Distance to closest town or city</li> <li><input type="checkbox"/> Grocery stores</li> <li><input type="checkbox"/> Hardware stores</li> <li><input type="checkbox"/> Laundry facilities</li> <li><input type="checkbox"/> Distance to nearest hotel(s)</li> <li><input type="checkbox"/> Average single- and double-bed room prices</li> <li><input type="checkbox"/> Availability of group rates</li> <li><input type="checkbox"/> Other tourist attractions in the area</li> <li><input type="checkbox"/> Site facilities</li> <li><input type="checkbox"/> General description of site (open fields, heavy woods, rolling hills, etc.)</li> <li><input type="checkbox"/> Size of site</li> <li><input type="checkbox"/> Site capacity</li> <li><input type="checkbox"/> Parking lot capacity (permanent structure types and count)</li> <li><input type="checkbox"/> Water source on the site (municipal, well, or other)</li> <li><input type="checkbox"/> How many spigots at what distances apart?</li> <li><input type="checkbox"/> Number of toilets</li> <li><input type="checkbox"/> Flushing</li> <li><input type="checkbox"/> Portable</li> <li><input type="checkbox"/> How often will they be serviced (emptied)?</li> <li><input type="checkbox"/> Number and description of showers (indoor, outdoor, primitive, heated, solar, etc.)</li> <li><input type="checkbox"/> Are non-camping accommodations available on site?</li> <li><input type="checkbox"/> If yes, what and how many beds?</li> <li><input type="checkbox"/> Trash pickup arrangements</li> <li><input type="checkbox"/> Equestrian facilities</li> <li><input type="checkbox"/> Handicapped facilities provided by the site</li> <li><input type="checkbox"/> List any other facilities available on site.</li> <li><input type="checkbox"/> Site permissions and restrictions</li> <li><input type="checkbox"/> Alcohol policy for the site</li> <li><input type="checkbox"/> General pet policy</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Is coursing of hounds permitted?</li> <li><input type="checkbox"/> Is equestrian activity permitted?</li> <li><input type="checkbox"/> Other shelter options (such as rental tents) available</li> <li><input type="checkbox"/> Grounds use limitations</li> <li><input type="checkbox"/> Any local modern ordinances, permits or requirements that must be taken into consideration</li> <li><input type="checkbox"/> Proposed Dates List all possible dates in order of preference.</li> <li><input type="checkbox"/> Average weather and temperature range in that area for the time of year</li> <li><input type="checkbox"/> Possibility of catastrophic weather events in the area during the time requested (hurricane, tornado, flood, etc.).</li> <li><input type="checkbox"/> Other large modern events in the area just before, during, and after the event</li> <li><input type="checkbox"/> Personnel</li> <li><input type="checkbox"/> List contact information and relevant major event experience for the head person in all applicable positions.</li> <li><input type="checkbox"/> Event Steward</li> <li><input type="checkbox"/> Exchequer</li> <li><input type="checkbox"/> Pre-Registration</li> <li><input type="checkbox"/> Head Gatekeeper/Troll</li> <li><input type="checkbox"/> Security/Constable</li> <li><input type="checkbox"/> Chirurgeon in Charge</li> <li><input type="checkbox"/> Marshal-in-Charge</li> <li><input type="checkbox"/> Event Herald</li> <li><input type="checkbox"/> Head Cook</li> <li><input type="checkbox"/> Children's Activities Coordinator</li> <li><input type="checkbox"/> Activities Coordinator</li> <li><input type="checkbox"/> Merchant Coordinator</li> <li><input type="checkbox"/> Land Allocation/Hotel Liaison</li> <li><input type="checkbox"/> Media Liaison</li> <li><input type="checkbox"/> Volunteer Coordinator</li> <li><input type="checkbox"/> Event Proceedings Coordinator</li> <li><input type="checkbox"/> Other staff</li> <li><input type="checkbox"/> Event activities</li> <li><input type="checkbox"/> Describe the planned event activities under the headings that apply for the event.</li> <li><input type="checkbox"/> Meetings and classes</li> <li><input type="checkbox"/> Fighting</li> <li><input type="checkbox"/> Archery</li> <li><input type="checkbox"/> Arts &amp; Sciences</li> <li><input type="checkbox"/> Children's activities</li> <li><input type="checkbox"/> Equestrian and/or coursing</li> </ul> |
|--|--|

- ☐ Heraldry and on-site communication
- ☐ First Aid/Chirurgion
- ☐ Main Courts/Royalty activities
- ☐ Land allocation
- ☐ Other activities
- ☐ Event financials
- ☐ Financial Policy for the event
- ☐ Who is on the Financial Committee
- ☐ How expenses get approved
- ☐ How emergency expenses get approved
- ☐ Proposed budget including:
- ☐ Proposed income using fees x expected attendance, not including NMS
- ☐ Proposed expenses by category and event activity
- ☐ Estimated front money needed to hold the event
- ☐ Proposed division of profit between the Corporation and the sponsoring group, and if applicable, any other groups.
- ☐ Proposed division of losses between the Corporation and the sponsoring group
- ☐ Evidence of Kingdom support
- ☐ Letters from the following officers stating that they have reviewed and support the proposal.
- ☐ Kingdom Seneschal
- ☐ Kingdom Exchequer
- ☐ Appropriate Kingdom Officers for the topic of the event
- ☐ Crown
- ☐ Obligation from Kingdom and Society Officers required
- ☐ Society Officer attendance at the event
- ☐ Cancellation/disaster plan
- ☐ Cancellation before the event
- ☐ Evacuation plan

## XXIV. SOCIETY SENESCHAL POLICIES & INTERPRETATIONS

### 1. **Marijuana Laws** – (Jan 2013 BoD Meeting)

In regards to marijuana laws, all SCA participants should follow modern law, both State and Federal. As it is still illegal under Federal law, marijuana is prohibited at SCA functions. Jan 2013 board Meeting.

### 2. **Slaughtering and Butchering** – (October 2016 BoD meeting)

The butchering of animals as a Medieval science may be allowed as part of a class or a demonstration; however, all modern health regulations must be followed if the meat is to be used to prepare/serve at an SCA event. Furthermore, all due caution should be observed so that individuals, both minors and adults, should not be subjected to a scene that would violate reasonable sensitivities. Additionally, the slaughtering of animals (domesticated mammals) at events are prohibited at SCA events. This ruling based upon the following prohibition against hunting (with noted exceptions) as per a previous ruling:

HUNTING: Policy Text: "Live animal hunt activities are prohibited at SCA events, practices, demos and other functions. These include, but are not limited to, deer hunting, boar hunts, and game bird shoots."

Implementing Guidance: The Policy is effective as of 10/30/05.

The Policy remains in effect until upheld or overturned by the Board of Directors. If upheld, it becomes a permanent policy. If it is overturned, it is eliminated at that time.

Enforcement: as with all Seneschal policies, primary responsibility for enforcement lies with the Office of Kingdom Seneschal.

The Policy does not address, nor restrict, fishing or falconry.

The Policy does not address, nor restrict, individuals hunting on site-owner's land with proper permits, licenses, and in accordance with applicable modern laws, regulations and statute.

The Policy does not address, nor restrict, the teaching of classes on period hunting techniques and the history of the same.

The Policy specifically targets SCA-sponsored activities that include live animal hunting.

### 3. **Golf Carts** – (April 2017 BoD Meeting)

When a group rents Golf Carts, the SCA's Golf Cart Insurance must be activated. The fee is \$50.00 for this activation and may be subject to change as required by our insurance company. All other requirements set forth by the Corporate Office dealing with insurance apply including all pertinent late fees.

### 4. **Harassment and Bullying** – (July 2017 BoD Meeting)

The SCA prohibits harassment and bullying of all individuals and groups. Harassment and bullying includes, but is not limited to the following:

- offensive or lewd verbal comments directed to an individual;
- the display of explicit images (drawn or photographic) depicting an individual in an inappropriate manner;

- photographing or recording individuals inappropriately to abuse or harass the individual;
- inappropriate physical contact; unwelcome sexual attention; or retaliation for reporting harassment and/or bullying.

Participants violating these rules are subject to appropriate sanctions. If an individual feels subjected to harassment, bullying or retaliation, they should contact a seneschal, President of the SCA, or the Kingdom's Board Ombudsman. If a participant of the SCA becomes aware that someone is being harassed or bullied, they have a responsibility pursuant to the SCA Code of Conduct to come forward and report this behavior to a seneschal, President of the SCA or Kingdom's Board Ombudsman.

The following statement must be posted at gate/troll at every SCA event in a size large enough for people to see it as they enter our events. This language must likewise be quoted in ALL site handouts at every event a site where a handout is made available.

**THE SCA PROHIBITS HARASSMENT AND BULLYING OF ALL INDIVIDUALS AND GROUPS.**

Participants engaging in this behavior are subject to appropriate sanctions. If you are subjected to harassment, bullying or retaliation, or if you become aware of anyone being harassed or bullied, contact a seneschal, President of the SCA, or your Kingdom's Board Ombudsman.

#### **5. Policy on Religion – (June 4, 2018 - BoD Meeting)**

The Society's Policy on Religion should not be parsed out and isolated in a vacuum as individual concepts, because the context of the actual language could then be lost to misinterpretation.

The Society, its Kingdoms and local groups, through its officers and participants, are not allowed to give the appearance of establishing, sponsoring or promulgating a religion or belief system.

Likewise, the Society may not prohibit any system of beliefs of its individual participants. As such, the Society is protecting the rights of individual participants by neither imposing a different belief system upon its participants, nor banning the practice of any participant's belief system.

The utilization of aspects of historical accuracy for theatrical emphasis does not violate policy; however, a claim of historical accuracy or theatricality does not give the officers and participants of the Society the ability to abrogate the Society's Policy on Religion. Our game encompasses the pre 17th Century world and as such, this portion of the corporate documents does not intend to discourage the study of historical belief systems and their effects on the development of Western Culture.

Religious rituals, whether historical, imaginary, or theatrical when performed in Royal Courts violate the Society's Policy on Religion which protects individual participants from being subjected to a religious or quasi-religious ceremony. Forcing participants to observe religious ceremonies by either direct or indirect pressure is prohibited, and

Royal Courts must not imply that any particular religious ceremony is authorized, sponsored, or promulgated by the Society.

Prayer in Royal Courts (in English or in a foreign language, ancient or medieval), whether individually spoken, group prayer or a prayer calling for a response violates the Society's policy.

Additionally, the Officers and participants in the Society shall not make religious statements in official pronouncements (whether verbal or in writing). Care should be taken by officers and participants in the Society to be respectful of others and to be reasonable in their words and deeds so that their words and deeds do not violate the Society's Policy on Religion.



## **XXV. ANNOTATIONS REFERRING TO GOVERNING DOCUMENTS (GovDocs)**

- <sup>1</sup> GovDocs III.B.
- <sup>2</sup> GovDocs Warrant Forms in Appendix B.
- <sup>3</sup> GovDocs IV.C.1-10.
- <sup>4</sup> Policy interpretation on GovDocs VII.A.
- <sup>5</sup> GovDocs I.A.2.
- <sup>6</sup> GovDocs VII.K.1.
- <sup>7</sup> GovDocs VII.L.1.
- <sup>8</sup> GovDocs I.A.2.
- <sup>9</sup> SocSen Policy
- <sup>10</sup> GovDocs I.A
- <sup>11</sup> GovDocs X.B.1.b.
- <sup>12</sup> Policy interpretation on GovDocs II.E.3.
- <sup>13</sup> Policy interpretation on GovDocs VII.
- <sup>14</sup> GovDocs V.A.1-3.
- <sup>15</sup> GovDocs IV.G.7.
- <sup>16</sup> GovDocs VII.K.1.
- <sup>17</sup> Policy interpretation on GovDocs VII.A .
- <sup>18</sup> Restatement of Corporate Communication Policy
- <sup>19</sup> GovDocs X.C.4.
- <sup>20</sup> GovDocs X.C.2.
- <sup>21</sup> GovDocs X.C.1.
- <sup>22</sup> Policy interpretation on GovDocs VII.A.
- <sup>23</sup> GovDocs VI.6.
- <sup>24</sup> Policy interpretation on GovDocs VII.
- <sup>25</sup> GovDocs VII.J.1.
- <sup>26</sup> SocSen Policy
- <sup>27</sup> GovDocs VII.B.
- <sup>28</sup> QtrlyMtg 4-15-2000,VI Section E Policy Decisions 1, Society Financial Policy
- <sup>29</sup> GovDocs VIII.
- <sup>30</sup> Policy interpretation on GovDocs VII.
- <sup>31</sup> GovDocs VII.J.4.
- <sup>32</sup> GovDocs VII.K.1.
- <sup>33</sup> GovDocs VII.L.3.
- <sup>34</sup> GovDocs VII.M.1
- <sup>35</sup> GovDocs II.E.1.
- <sup>36</sup> GovDocs II.E.1.
- <sup>37</sup> GovDocs XVI.
- <sup>38</sup> GovDocs XIII.
- <sup>39</sup> GovDocs IV-VI.
- <sup>40</sup> GovDocs VI.2.
- <sup>41</sup> GovDocs VI.3-4.
- <sup>42</sup> GovDocs IV.C&D.
- <sup>43</sup> GovDocs V.A. & IX.A.5.
- <sup>44</sup> GovDocs IX.A.7.
- <sup>45</sup> GovDocs VI.6.
- <sup>46</sup> GovDocs VI.6.
- <sup>47</sup> GovDocs VI.
- <sup>48</sup> SocSen Policy

- 49 Policy interpretation on GovDocs I.B.1. & XIII.A.1.
- 50 Policy interpretation on GovDocs II.A.
- 51 GovDocs II.C.
- 52 GovDocs II.A.
- 53 GovDocs IV.A.1.
- 54 GovDocs IV.A.3.
- 55 GovDocs IV.A.2.
- 56 GovDocs IV.A.2.
- 57 GovDocs II.E.2
- 58 GovDocs II.E.2.
- 59 Policy interpretation on GovDocs II.A.
- 60 Policy interpretation on GovDocs V.A.
- 61 Policy interpretation on GovDocs VII.B.
- 62 GovDocs IV.F.
- 63 Policy interpretation on GovDocs I.A.
- 64 Policy interpretation on GovDocs X.C.4.
- 65 GovDocs IV.F.2
- 66 GovDocs IV.F.2.
- 67 Policy interpretation on GovDocs Corpora VII.B.
- 68 GovDocs III.B.
- 69 Policy interpretation on GovDocs Corpora III.
- 70 Policy interpretation on GovDocs III.
- 71 GovDocs III.D.4
- 72 GovDocs III.B.
- 73 GovDocs III.D.3.
- 74 Policy interpretation on GovDocs Corpora III.D.5-8.
- 75 GovDocs III.C.5.
- 76 GovDocs VII.B.4.
- 77 GovDocs III.C.5.
- 78 GovDocs III.D.4.
- 79 Policy interpretation on GovDocs III.D.5-7.
- 80 GovDocs III.D.1.
- 81 Policy interpretation on GovDocs III.D.5-6.
- 82 GovDocs III.B
- 83 Policy interpretation on GovDocs III.C.4.
- 84 GovDocs III.C.4.
- 85 Policy interpretation on GovDocs III.C.3.
- 86 GovDocs III.C.2.
- 87 Policy interpretation on GovDocs III.E.
- 88 By-Laws IX.
- 89 GovDocs VIII.

## **XXVI. ERRATA**

October 2016 – Slaughtering and Butchering Policy

April 27, 2017 – XI.A.1 – add “A background check is also required for all YAFA Program officers including volunteer mentors.”

April 27, 2017 – XI.A.2 – change US to United States

April 2017 – Golf Cart Policy

July 2017 – Harassment and Bullying Policy